



COLUMN FIVE

Brand Strategy Toolkit

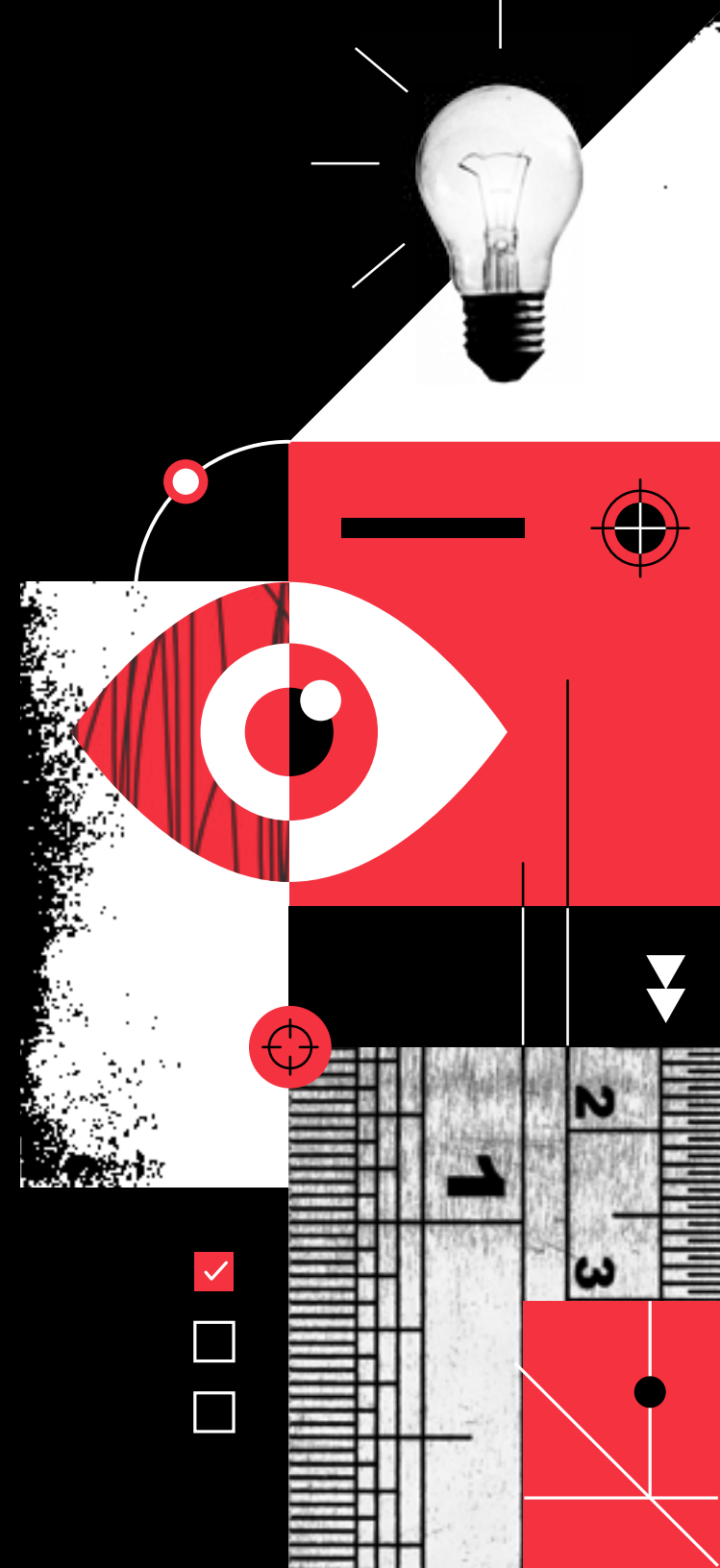


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Here, we've assembled the tools, tips, and templates you need to build a brand from the ground up. Work through each item in order, or click on an individual tool to jump directly to it.

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For more step-by-step guidance, see our [Guide to Build a Brand Strategy](#).

Brand Heart

Workbook



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

For detailed directions to complete this exercise, follow our

[Guide to Find Your Brand Heart.](#)

Purpose

➔ Why do we exist?

Examples

Column Five's Vision/Purpose

We exist to help build a future where everyone can live healthy and fulfilled lives.

San Diego Zoo

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

Casper

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

Bulletproof

To help people perform better, think faster, and live better.

Special Olympics

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

IKEA

To create a better everyday life for the many people.

Boy Scouts of America

To prepare every eligible youth in America to become a responsible, participating citizen and leader who is guided by the Scout Oath and Law.

Charles Schwab

Helping investors help themselves.

Life is Good

To spread the power of optimism.

Vision

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

Examples

Casper

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

Teach for America

One day, all children in this nation will have the opportunity to attain an excellent education.

Alzheimer's Association

A world without Alzheimer's disease.

Oxfam

A world without poverty.

Microsoft

Empower every person and every organization on the planet to achieve more.

Uber

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

Caterpillar

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

Salesforce

We believe that the business of business is to improve the state of the world, and we work to make sure Salesforce is a platform for change through serving the interests of all our stakeholders—employees, customers, partners, communities, and the environment.

Mission

- ➔ **What are we here to do?**
How do we create that future?

Examples

Column Five

We do good work with good people. We tell stories and create experiences that bring people together to help build the future we want to live in.

Casper

We're setting a new standard in sleep innovation.

Sweetgreen

To inspire healthier communities by connecting people to real food.

Tesla

To accelerate the world's transition to sustainable energy.

Nike

Do everything possible to expand human potential.

Ra Yoga

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

Yeti

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

JetBlue

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

Dropbox

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

Values

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

You can include as many as you like, but 3-5 is a healthy start.

Examples

Column Five

1. Do Good Work

We achieve success with our partners by working together to creatively solve complex challenges within any parameters.

2. Value Our Partners

We thrive in an environment built on transparency and mutual respect, constructively challenging each other to grow.

3. Be Good To Each Other

We always work in their best interest because they enable us to do what we love each day.

4. Be Humble

We can always improve.

5. Experiment Often

Try new things. Test, fail, tweak, learn.

Whole Foods

1. We Satisfy And Delight Our Customers

Our customers are the lifeblood of our business and our most important stakeholder. We strive to meet or exceed their expectations on every shopping experience.

2. We Promote Team Member Growth And Happiness

Our success is dependent upon the collective energy, intelligence, and contributions of all of our Team Members.

3. We Care About Our Communities And The Environment

We serve and support a local experience. The unique character of each store is a direct

reflection of a community's people, culture, and cuisine.

4. We Practice Win-Win Partnerships With Our Suppliers

We view our trade partners as allies in serving our stakeholders. We treat them with respect, fairness, and integrity—expecting the same in return.

Patagonia

1. Build the Best Product

Our criteria for the best product rests on function, repairability, and, foremost, durability. Among the most direct ways we can limit ecological impacts is with goods that last for generations or can be recycled so the materials in them remain in use. Making the best product matters for saving the planet.

2. Cause No Unnecessary Harm

We know that our business activity—from lighting stores to dyeing shirts—is part of the problem. We work steadily to change our business practices and share what we've learned. We seek not only to do less harm, but more good.

3. Use Business To Protect Nature

The challenges we face as a society require leadership. Once we identify a problem, we act. We embrace risk and act to protect and restore the stability, integrity, and beauty of the web of life.

4. Not Bound By Convention

Our success—and much of the fun—lies in developing new ways to do things.

Personas Template



Identify your audiences to understand how your brand can speak to their unique needs.

For more instructions on how to use this template, see our

[Guide to Create Marketing Personas.](#)

Persona 1**Persona 2****Persona 3**

	Persona 1	Persona 2	Persona 3
Name			
Age (if applicable)			
Gender (if applicable)			
Job title (if applicable)			
Channels (where you can connect with them)			
Goals (what they want)	1. 2. 3.	1. 2. 3.	1. 2. 3.

Persona 1

Persona 2

Persona 3

	Persona 1	Persona 2	Persona 3
Pain points (the barriers to what they want)			
How your product/service helps solve problems (the messages you want your content to convey)			

Competitive Analysis Template

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

For more details on using this template, see our

[Guide to Complete a Competitive Analysis.](#)

Brand 1

Brand 2

Brand 3

Competing brands

**Brand Heart
(purpose, vision,
mission, values)**

Brand look/feel

Value proposition

Tagline

**Core products/
services**

Customer personas

**How they talk
about their
customers**

	Brand 1	Brand 2	Brand 3
Competing brands			
Brand Heart (purpose, vision, mission, values)			
Brand look/feel			
Value proposition			
Tagline			
Core products/ services			
Customer personas			
How they talk about their customers			

Brand 1

Brand 2

Brand 3

Customer acquisition

Marketing channels

Advertising channels

Sales channels
(if applicable)

Revenue

Strengths

Weaknesses

Similarities

Differences

	Brand 1	Brand 2	Brand 3
Customer acquisition			
Marketing channels			
Advertising channels			
Sales channels (if applicable)			
Revenue			
Strengths			
Weaknesses			
Similarities			
Differences			

Brand Messaging Template

Articulate your value prop, tagline, and messaging pillars to help content creators tell a consistent brand story.

For more detail on how to use this template, see our

[Guide to Craft Your Brand Messaging.](#)

Tagline



Value prop



Brand Messaging Pillars



Pillar 1	Pillar 2	Pillar 3
Supporting point	Supporting point	Supporting point
Supporting point	Supporting point	Supporting point
Supporting point	Supporting point	Supporting point

Brand Voice

Questionnaire

Identify your brand voice to humanize your brand and communicate consistently through all content.

For more detail on using this template (as well as additional exercises), see our [Guide to Find Your Brand Voice](#).

➔ **1) When people interact with our brand, how do we want them to feel?**

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

[Empty dotted box for notes]

➔ **2) What adjectives would we use to describe our brand?**

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

[Empty dotted box for notes]

➔ **3) What does our competition sound like?**

Think about ways you can differentiate yourself through your brand voice.

[Empty dotted box for notes]

➔ **4) What is another brand with a voice we love?**

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

[Empty dotted box for notes]

➔ **5) If our brand were a celebrity, who would we be?**

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

[Dotted-line response box]

➔ **6) How do we want to talk about ourselves?**

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

[Dotted-line response box]

➔ **7) Who do we NOT want to be/what do we want to avoid?**

Identify buzzwords you hate, phrases to avoid, etc.

[Dotted-line response box]

Visual Identity Checklist



Design an effective and comprehensive visual identity that communicates who you are.

For more detail on designing your brand, see our [Guide to Build a Brand Identity](#).

□ Logo

Design a logo that reflects your brand personality.

- Ensure logo design works for web and print.
- Test that it renders well at small sizes.

□ Colors

Curate a simple but flexible palette.

- Choose 1 main color, 2 primary colors, 3-5 complementary colors, and 2 accent colors.

□ Typography

Select type that works as an extension of your logo.

- Identify a primary, secondary, and tertiary typeface.
- Consider mixing serif and sans serif.
- Test for legibility in print and on screen.

□ Hierarchy

Create a logical, intuitive system.

- Focus on guiding the viewer through the content easily.
- Include specifications for headers, subheaders, body copy, images, blurbs, etc.

□ Photography

Use consistent, cohesive visual styles.

- Ensure imagery is high quality and high resolution.
- Be mindful of inclusive representation.

□ Illustration

Use illustrations to visually enhance, not overwhelm.

- Choose a single style.
- Keep it simple.

□ Iconography

Focus on simplicity and clarity.

- Double check that icons render clearly at small sizes.
- Make sure the image is relevant to the subject.

□ Data Visualization

Design for comprehension.

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

□ Video & Motion Graphics

Keep branding consistent.

- Choose an animation style.
- Provide guidelines for kinetic text.

□ Web Design & Interactivity

Focus on creating the best user experience.

- Consider accessibility.
- Design for mobile.

Brand/Rebrand Questionnaire

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

For more detail on how to use this questionnaire, see our

[Guide to Successfully Complete a Rebrand.](#)

Current Core Identity

➔ 1) Organization name

List the way you want it on the logo and any other derivatives.

➔ 2) What does our business do?

Use a succinct, objective description.

➔ 3) What is our Brand Heart?

List your purpose, vision, mission, and values.

➔ 4) How is our brand currently perceived? Does it align with our Brand Heart?

➔ 5) How do we want to be perceived?

➔ 6) How has our brand changed over time?

[Empty dashed box for answer to question 6]

➔ 7) Who is our audience?

[Empty dashed box for answer to question 7]

➔ 8) Who is our competition? How do we fit into the landscape?

[Empty dashed box for answer to question 8]

➔ 9) How do we differentiate our brand?

[Empty dashed box for answer to question 9]

➔ 10) What is our current brand personality?

Place an X where you want your brand to fall on the spectrum below.

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

Current Visual Identity

- ➔ 1) What does our current visual identity look like?

Describe logo, color, typography, etc.

- ➔ 2) What does our current visual identity communicate?

- ➔ 3) How does our current visual identity align or misalign with our values?

- ➔ 4) What do we NOT like about our current visual identity?

- ➔ 5) How has our visual identity changed over time?

➔ 6) How do we feel about our current logo?

Empty dotted-line response box for question 6.

➔ 7) Where will our logo be used (print, web, social)?

Empty dotted-line response box for question 7.

➔ 8) Why are we creating a new and unique logo?
Why now?

Empty dotted-line response box for question 8.

➔ 9) Should our new logo be “evolutionary” or “revolutionary”?

Decide whether you want to update your current logo or start from scratch.

Empty dotted-line response box for question 9.

➔ 10) Why type of “character” or “personality” would we like our new logo to have?

[Empty dashed box for response]

➔ 11) What type of logo are we more drawn to?

[Empty dashed box for response]



Logomark

A symbol or abstract representation of the brand (e.g., Nike’s swoosh, McDonald’s arches, etc.).

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Logotype

Stylized letters representing the brand’s name (e.g., Coca-Cola, Dell, FedEx, NASA, etc.).



Combination mark

A logo that uses a combination of both words and symbols to represent the brand (e.g., AT&T, Domino’s, etc.).

Current Verbal Identity

➔ 1) What differentiates us?

Articulate how you're different from your competitors by filling in this statement:
"Our [offering] is the only [category] that [benefit]."

➔ 2) What is our current tagline?

➔ 3) What is our current value prop?

➔ 4) What are our three main selling points/ messaging pillars?

➔ 5) What is our current brand personality?

It can also be helpful to describe your brand as a persona (e.g., George Clooney with the irreverent humor of Jon Stewart).

➔ 6) What is our current brand voice/tone?



Still need help to figure it all out? Find out what it's like to [work with us](#) on your brand strategy, or [reach out](#). We'd love to help you bring your brand to life.

Created by



COLUMN FIVE

Column Five is a B2B-focused creative agency that helps ambitious brands find and tell their best stories to drive real results.