

# Brand Strategy Checklist



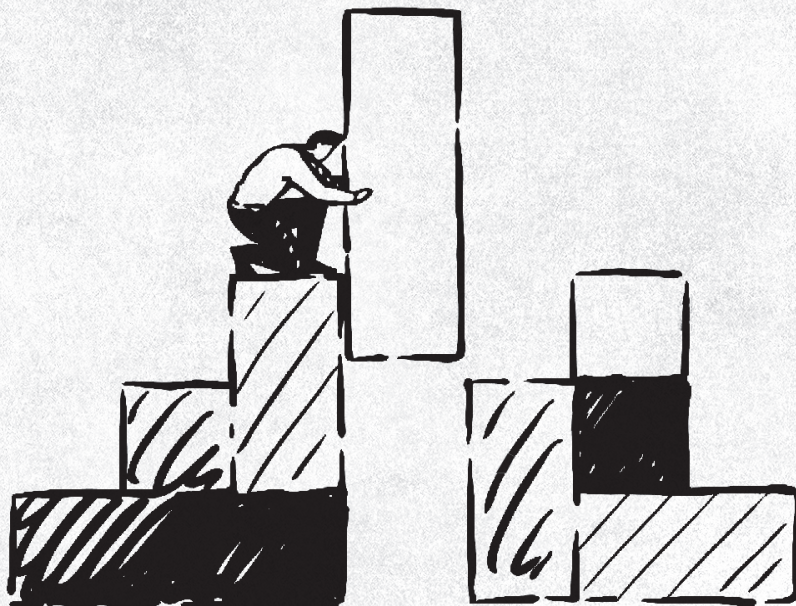
**BUMBLEBEE**  
**BRANDING COMPANY**

# Introduction

Regardless of where you're at in the branding process, there are some universal aspects of brand strategy that need your attention before your brand is truly ready for primetime.

This checklist covers all the brand strategy basics in a clear and concise way.

Inspired by the success of brands we've built to dominate their target markets, each brand strategy component listed here is critical for the cohesion of your brand as a whole.



# Why You Need a Brand Strategy

The most effective brands in the world weren't cooked up overnight.

Building a sustainable and loyal customer base hinges on your brand connecting with the consumer in a way that is memorable and enjoyable. To truly develop a brand that communicates the value, feeling, and voice of your product or service, you need a tactical approach that leaves as little to question as possible.

In our experience as established brand strategists, planning the work and then working the plan provides faster and more profitable outcomes.

Brand strategy requires critical thinking, collaboration, and an understanding of every component of your brand. It also includes analyzing and understanding your customer to ensure the best fit for your brand in the market.

Yes, it's a lot to tackle. But, with this checklist, you'll be armed with the tools you need to go forth and conquer.

Let's get started.



# Core Components

These are the 'essentials' in building a brand. Without them, your brand is just a good idea.

## Business Case

Your business case is the very reason why you're bringing a product or service to market. A solid business case should include a description of the problem you're looking to solve, the options available to your target market for solving that problem, and how your product or service is a superior solution in comparison to those options.

## Values

What does your brand stand for? What are its ultimately human traits? **Zenefits**, an outsourced HR services provider, smartly spells out the values of their brand: Empathy. Integrity. Innovation.

## Mission

The mission of your brand is its primary directive and fundamental purpose. For example, Coca-Cola's mission is to **"Refresh the world and to make a difference."**

## Vision

Closely related to the mission, the vision is a projection of what the future will look like because of your brand. **Consider Apple**, whose vision is to "make the best products on earth, and to leave the world better than we found it."

### Our Mission

**HealthRecon**  
CONNECT

HealthRecon Connect offers cost-effective, innovative, compliant, and scalable services & solutions to help healthcare providers improve cash flow, patient outcomes, and promote peace of mind.



## □ Positioning

Positioning refers to the space that a brand occupies in the psychology of its target customers. In other words, this is the who, where, how, when, and why of your brand.

## □ Promise

If a customer engages with your brand, what experience can they expect to have? **Ford** promises that customers will “Go Further”. **Starbucks** promises to “Inspire and nurture the human spirit”.

## □ Personality

After developing a brand persona, it’s necessary to also craft a personality. Are you noticing a theme here? The idea is to get as close as possible to human-to-human interaction with the consumer whenever brand engagement occurs.

## □ Story

Every brand has a story. And, that story is absolutely critical to consumers, because humans relate with narratives. After all, each of us has a story; your brand should, too.

## □ Customer Personas

A customer persona can be thought of as a fictional character created specifically for the purpose of representing a user or customer type that is likely to use a site, brand, or product in a similar way.

Customer personas are often developed very early on in the branding process, and they provide direction for honing a brand over time.

## □ Competitor Analysis

A sound competitor analysis is a must for any brand. It should answer the question of how your brand is going to fare when it goes up against your stiffest competition in the market.

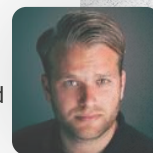
### Target Persona

#### Leader Roles

- Director of Operations
- Director QA
- QA Manager
- Lean Manufacturing Director

#### Pain Points

- Inefficient processes
- Labor shortage due to migrant farming fluctuations can lead to higher cost and lower throughput within operations
- Slow at changing direction, adapting to change, or bouncing back



# Communication

Once the core components of your brand are addressed and defined, it's time to move to the arena of communication. Many communication-related brand features will take direction from the core components listed above, but they should also be capable of standing on their own.

## Voice/Tone

Commanding or inviting? Empathetic or assertive? Logical or emotional? Construct the voice of your brand so it is as identifiable as the logo, color theme, and catch phrases you're using.

## Messaging

Successful brands go where their customers are and engage with them in their natural, everyday environments. This means tailoring messaging to suit the objectives outlined above.

## Vocabulary

In developing a brand strategy, words are among the most powerful tools you have. Choose them wisely, and ensure that word use is consistent throughout every messaging platform you intend to use.

### Voice/Tone



At Mailchimp, we've walked in our customers' shoes, and we know marketing technology is a minefield of confusing terminology. That's why we speak like the experienced and passionate business partner we wish we'd had way back.

# Visual

No brand strategy checklist would be complete without a rundown of essential visual elements. For packaging, website design, marketing communications, and more, the visual impact your brand will have long-lasting effects on the development and maintenance of customer allegiance.

## Logo

Developing a logo seems like such a simple task. That is, until you realize just how nuanced and iterative this task can be. A brand logo is the central visual element that will be top-of-mind with your customer before, during, and after engagement with your brand. As such, your brand logo deserves to be extensive and thoughtful.

## Typography

Graphic designers know this all too well: the font type, size, formatting, and even character spacing used in brand messaging have a colossal impact on how the brand performs overall.

## Color Palette

Global-scale brand wars have been won and lost because of the use of color. Charmin uses **calming, soothing bluish hues** to sell their toilet paper products, while power tool manufacturer DeWALT relies on the attention-grabbing, high-contrast use of **bold yellow against black** to elicit feelings of toughness and durability.

Alternatively, many successful brands use more subdued coloration on purpose. A great example is **UPS' copious use of brown and burnt yellow**.

## Photography

This is one of the most often-overlooked aspects of brand strategy. For your brand to truly make an impact, you need high-resolution, brand-correct photos that are evocative, aesthetically pleasing, and relevant.

Logo



# Brand Experience

Any time a potential or existing customer interacts with your brand, there is an experience that is had. This experience needs to be steered as much as possible to achieve the desired outcomes referenced earlier in this checklist. The brand experience encompasses the following:

## Product Development

At every stage of product development, attention should be paid to what the user or customer is experiencing. Every exchange, interaction, feature, and option should be analyzed for its contribution to total brand engagement.

## Environment

Will your customers encounter your brand in-person, online, or both? How many of your brand assets fall into either category? Is this proportion weighted to accommodate how your customers naturally think, act, and behave?

## Customer Service

Often treated as an afterthought, customer service is absolutely critical in pulling the customer through to post-sale engagement and ensuring a comprehensively brand-aligned experience.

### Brand Experience

Everybody knows that people go to Starbucks, not for the coffee, but for the experience. The way the baristas personalize your purchase by calling out your name, how the store managers remember their regular customers, & how each one of your trips to Starbucks becomes memorable!





# Brand Measurement

After so much work has been done to develop and hone the brand, we now need to determine ways to measure its effectiveness. Generally speaking, this is done by examining four key metrics.

## Brand Awareness

Are customers aware of your brand? How can you tell? In the digital space, this is comparatively easy: just look at website traffic and marketing campaigns. Customer outreach surveys can also be used.

## Brand Reputation

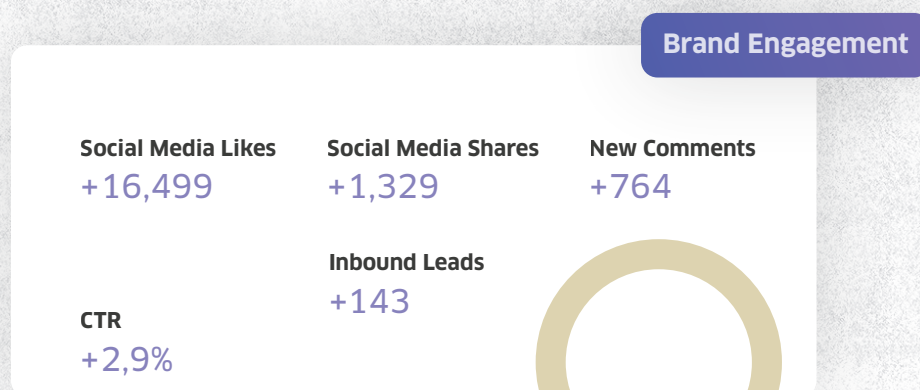
Investigate brand reputation software and platforms. For example, many can monitor brand mentions and tally positive and negative keywords. This can also be done by analyzing online reviews.

## Brand Engagement

Social media likes, commentary, and content sharing. Click-through rates. Email opt-outs. Inbound lead flow. How much are your customers engaging with your brand?

## Brand Loyalty

Determining customer loyalty informs strategic decision making related to growing topline profits. Loyalty becomes a byproduct of good branding, and it can even forgive product issues.



# Smart Brand Strategies. Sustainable Long-Term Growth.

Building a brand takes a lot of coordinated effort, and not just from those who know branding.

Sales, operations, marketing, compliance, distribution...virtually every corner of a business has a role to play in the development of a brand. There is no one-size-fits-all solution for any given brand, and as such, every approach to brand strategy is going to be unique.

At Bumblebee, we've made it our life's work to assist our clients in the conception and execution of powerful, effective brand strategy that drives growth and delivers ROI.

## How can we help your brand succeed?

Contact us today, and let's  
start a conversation.



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