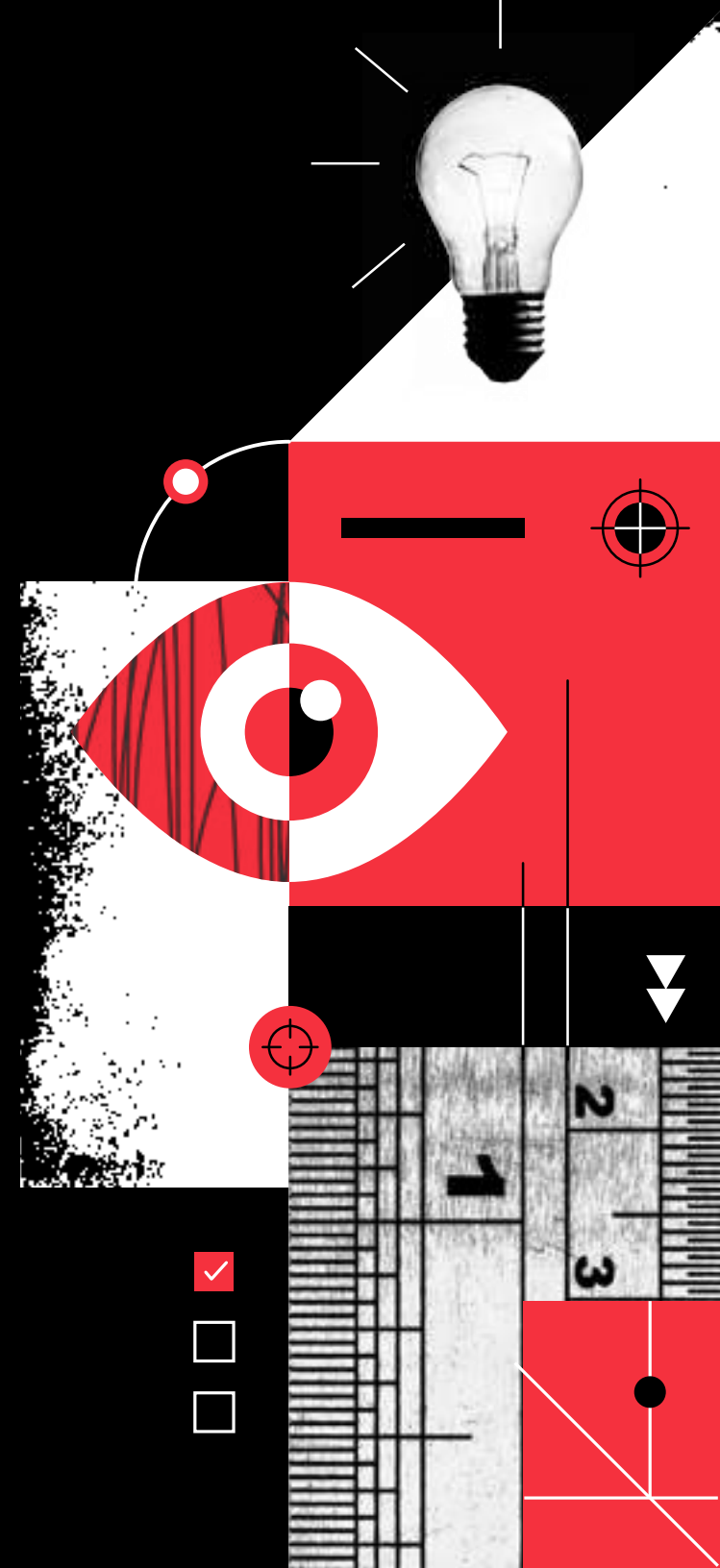




COLUMN FIVE

# 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

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**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.

### Charles Schwab

Helping investors help themselves.

### 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.

### 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

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**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

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

### 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

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**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
Customer acquisition			
Marketing channels			
Advertising channels			
Sales channels (if applicable)			
Revenue			
Strengths			
Weaknesses			
Similarities			
Differences			

# Brand Messaging Template

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**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**

Supporting point

Supporting point

Supporting point

**Pillar  
2**

Supporting point

Supporting point

Supporting point

**Pillar  
3**

Supporting point

Supporting point

Supporting point

# Brand Voice

## Questionnaire

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**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.

➡ **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.

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

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

➡ **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.

## ➡ 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.

## ➡ 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.

## ➡ 7) Who do we NOT want to be/what do we want to avoid?

Identify buzzwords you hate, phrases to avoid, etc.

# Visual Identity Checklist

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**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

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**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?

➡ 7) Who is our audience?

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

➡ 9) How do we differentiate our brand?

➡ 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

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- 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?

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

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

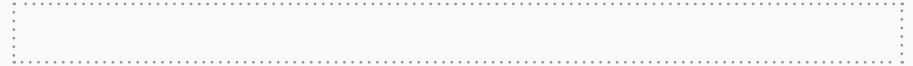
➡ 9) Should our new logo be “evolutionary”  
or “revolutionary”?

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

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



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



**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.).



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FIVE**

**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

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## ➡ 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.