

# Tool

## Build a Genuine Brand: Brand Planning Worksheet

Making your brand look its best starts with great planning. This free brand planning worksheet walks you through exercises that top consultants use with large companies to help them objectively assess their brand, and focus their thinking in the right areas.

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YOUR NAME  
BRAND NAME

### Brand Planning Worksheet

This easy to use brand planning worksheet will help small to medium businesses plan the path to identify important principles that provide clear direction for creating or improving your brand.

- 1. What business is your brand in?**  
Describe the general business category and high-level value that you provide your customers.  
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- 1. How do you offer superior value to your customers?**  
Describe the detailed benefits that you provide and some proof points.  
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\_\_\_\_\_
- 2. Who are your primary competitors and what differentiates your products and services from theirs?**  
Generally speaking, what are the unique benefits that your company provides? How do they fill an existing customer need and gap in the competitive market?  
\_\_\_\_\_  
\_\_\_\_\_
- 3. What are your core values and beliefs?**  
Name a handful of values/beliefs that are central to the business. Most companies can outline 5-10 important ones. These should be present in all business decisions and should be apparent to your customers through their experience with your products and services.  
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\_\_\_\_\_
- 4. What words would you like consumers to use?**  
What do you want your brand to be known for?  
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### **STEP 1**

Establish a brand planning team within the company.

### **STEP 2**

Distribute the brand planning worksheet and have each member of the brand planning team complete it individually.

### **STEP 3**

Come together to discuss each person's responses, build consensus, and gain alignment in a common vision for how you would like the brand to be perceived.

At the end of this exercise, you and the team should have a much better idea of the goals so you can create a productive action plan for achieving them.

# Build a Genuine Brand: Brand Planning Worksheet

## 1. What business is your brand in?

Describe the general business category and high-level value that you provide your customers.

## 2. How do you offer superior value to your customers?

Describe the detailed benefits that you provide and some proof points.

## 3. Who are your primary competitors and what differentiates your products and services from theirs?

Generally speaking, what are the unique benefits that your company provides? How do they fill an existing customer need and gap in the competitive market?

## 4. What are your core values and beliefs?

Name a handful of values/beliefs that are central to the business. Most companies can outline 5-10 important ones. These should be present in all business decisions and should be apparent to your customers through their experience with your products and services.

## 5. What words would you like consumers to use to describe your brand?

What do you want your brand to stand for in the eyes of your customers?

## 6. What are your brand's strengths and weaknesses?

All brands have strengths and weaknesses. It's important to list them out so you have a better idea of how to capitalize on your advantages and improve your disadvantages.

## 7. What are the most important factors, from the consumer's perspective, when choosing your brand?

Why do customers do business with you instead of someone else? If you aren't sure, it may help to gather some feedback by talking to them, or asking them to complete a survey.

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### **8. What are the least important factors from the consumer's perspective?**

It's important to be clear about your customer's key priorities. Sometimes this sheds light on too much of the company's resources being spent in the wrong place. From an internal perspective, what do you believe are the most important factors?

### **9. What do you see to be key to the business in order to sustain competitive advantage?**

Often these are items that aren't readily visible to the consumer, such as solid supplier relationships, reliable inventory systems, steady cash flow, etc.

### **10. If your brand were an automobile, what kind would it be and why?**

This is a fun question that most people can relate. It reveals characteristics that describe your desired brand image, which can lead to ideas about how to better achieve that perception with customers.

### **11. If your brand were an animal, what kind would it be and why?**

This is one more fun way to consider the desired attributes of your brand.

### **12. How do your competitors' customers perceive your brand? (Strengths and weaknesses)**

This can be a tough question to answer because you may not have this information. But do your best to put yourself in their shoes and imagine what they think of you. Because people's perceptions can be based on limited information, this exercise often exposes some opportunities to serve your competitors' customers in a way that they didn't expect.

### **13. Does your brand position allow you to be the first in any aspect of the market, category or industry?**

This can be a tough one too—especially for small to medium businesses. If you find yourself struggling to find an aspect of your business that doesn't put you in the clear lead, it may indicate an opportunity to do some deeper thinking about how your strengths can be exploited to serve a niche and create more competitive advantage.

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### **14. Is there another brand, organization or company that is very similar to yours?**

Many times there is. This exercise should prompt you to consider just how similar they are. Too similar? What are the differences? What can be learned from those companies? What can your company do better?

### **15. What do your customers expect in terms of a guarantee of satisfaction?**

It's important to know what is required to make sure your customers are completely satisfied, and if not, what you can do to address any dissatisfaction. How can guarantees of quality and satisfaction be communicated and used to create competitive advantage?

### **16. What is your brand's story? (History, unique points, founders, etc.)**

Everyone loves a good story of how a brand came into being. Who are the founders? What were the circumstances or points of inspiration that led to the formation and development of the company? How can this story be told in a compelling way that could help customers identify with the brand on a human level?

### **17. What are the messages that your brand will communicate?**

Based on everything you've considered in this worksheet exercise, how might your customer-facing messages be adjusted to convey the true essence of your brand, in a way that aligns with your desired image of the company, differentiates you from the competition, and delivers superior value for your customers?

### **18. Why was the particular name chosen for your brand? What does it represent?**

Finally, what inherent meaning is there in the name of your company and how does it align with your offering and your desired attributes for the brand? Is that connection clear to your customers? If not, what opportunities exist to make those ideas more accessible?