

Brand Strategy Template

The **Brand Strategy Template** is designed to help you work methodically through the eight steps on the Fit Small Business Brand Strategy Wheel to a powerful brand strategy for your business. You can use this template by yourself, or you can collaborate with your team or your agency to capture your ideas.



This template can be filled out on your computer or other devices, or you can print it out and fill out by hand. If you are using the PDF version, save your work frequently to ensure that you preserve your great ideas!



1. Define Your Target Audience

Complete with as much information as you currently have about your audience(s). Use a range where needed. Do you have different, distinct target audiences or customers? If so, fill in secondary and tertiary customer segments, or if not, leave blank.

Demographics & Psychographics

Characteristic	Primary Audience/ Customer Segment	Secondary Audience/ Customer Segment	Tertiary Audience/ Customer Segment
Age Range			
Gender/s M/F/T% of each (Male, Female, Transgender)			
Household Income (Range)			
Highest Education Completed			
Professions/Job Titles (3 examples)			
Interests (3 examples)			
Pain Point(s) to Solve (3 examples)			
Goals When Purchasing a Solution (3 examples)			



2. Study the Competition

Try to identify three top competitors in either the local, national, or global marketplace as applicable to your business. Use online research, industry reports, and networking to collect data on each of your competitors.

Identify your Competitors

Select a mix of direct and indirect competitors offering similar products or services to yours. List the top three here.

- 1.
- 2.
- 3.

List your responses below (120 characters max each)	Competitor 1	Competitor 2	Competitor 3
Market Position (Top, Middle, Lower)			
Sales and Marketing Tactics and Channels (i.e. website, social, TV, etc)			
Brand Positioning/Tagline			
Growth Strategy (if Known)			
Other Business-critical Characteristics			



Analyze Your Competitors' Strengths and Weaknesses *(120 characters max each)*

Identify What Your Competitors Are Doing Well and Where They're Struggling.

Doing Well?

Struggling?

What Do We/Can We Do
Better Than Each One?



3. Establish Your Brand's Mission, Vision, and Values

Your Mission:

What is your company's purpose? (120 characters max each)

Example: "[Our company] serves [customers] by [actions and/or qualities] in order to be [goal]."

Your Vision:

What is your company's highest aspiration in the future? (120 characters max each)

Example: "[Our company] seeks to be the [best, most popular, most trusted] in [industry] through [actions or qualities]."

Your Core Values:

What are the things that matter the most to you, your team, your customers?

Accountability	Adventurous	Belonging	Be Yourself	Care
Collaboration	Communication	Community	Courage	Courtesy
Craftsmanship	Curiosity	Customer	Deliver Wow	Diversity
Doing the Right Thing	Education	Obsession	Empathetic	Excellence
Fairness	Honesty	Embrace Change	Inclusion	Innovation/Invention
Integrity	Ingenuity	Hospitality	Kaizen	Leadership
Learning	Loyalty	Inspiring	Passion	People First
Playfulness	Professionalism	Operational Excellence	Respect	Responsibility
Safety	Scrappiness	Quality	Stewardship	Stronger Together
Sustainability	Transparency	Service	Teamwork	Value
		Trust		

Pick your **Three Top Values** in order of priority



4. Develop a Unique Brand Identity

Name of Your Company			
Company Tagline/Brand Position Statement (100 characters max)		Example: Nike—"Just Do It"	
Key Terms/Descriptors			
Product Name(s)			
Company Logo(s)		Insert the file name and/or link to your logo files here:	
Primary logo			
Alternative versions: B&W, Vertical & Horizontal Layouts			
Color Palette		Select markup tool (pencil icon) in Preview > pick solid color > go to 'show colors...' at bottom > select RGB, CMYK or other color you want. Match the RGB or CMYK number values, if you have them > select each block and select colors to get the palette you want. You can also use the eyedropper tool (icon) to select a color off an actual image on screen to get the color you want.	
Primary Color	Secondary Color	Accent Color	Foundation (Background) Color

**Verbal and Auditory Aspects** (120 characters max each)

Tone of Voice
(Serious, Playful, Powerful, Mysterious, etc.)

Music (Genre, Theme, Song)

Sound Effect or Tone

Feelings (Happy, Serene, Excited, Relaxed, Powerful, Confident, Satisfied, Joyful, Free); **Pick three to five.**

Other Senses

Taste(s)

Touch/Texture(s)

Scent(s)

Five Senses Your Brand Engages**Sight**

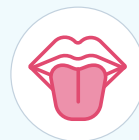
Retail Environment
Photography
Artwork
Colors
Logo

**Hearing**

Name & Tagline
Ambient Sound
Sound Effects
Story
Music

**Smell**

Fragrance

**Taste**

Food & Drink

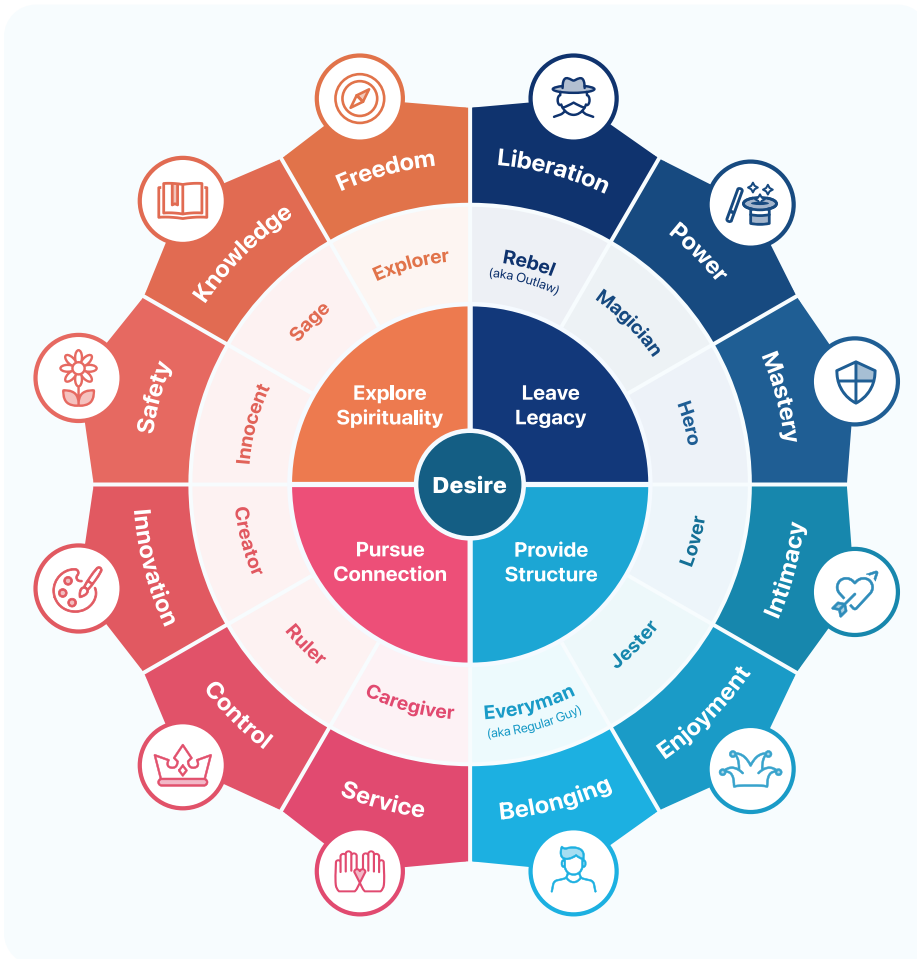
**Touch**

Texture & Materials



5. Identify Your Brand Archetypes and Personas

Based on the Brand Archetype wheel, choose the primary, secondary, and tertiary archetypes that most closely represent the brand. Rank with a 1, 2, and 3 respectively.



Rank 1-3	Archetype	Primary Characteristic	Deepest Motivation
	Hero	Mastery	Leave Mark on the World
	Magician	Power	
	Rebel (aka Outlaw)	Liberation	
	Explorer	Freedom	Explore Spirituality
	Sage	Understanding	
	Innocent	Safety	
	Creator	Innovation	Provide Structure
	Ruler	Control	
	Caregiver	Service	
	Everyman (aka Regular Guy)	Belonging	Pursue Connection
	Jester	Enjoyment	
	Lover	Intimacy	



6. Craft a Compelling Brand Story

What is your brand/company name?	
What year did you start?	
Do you remember the day you decided to start? What happened? Was there an inspirational moment or spark that started it all? Describe this. (200 characters max)	
What is the customer's key problem or need that inspired you to create your business? If you purchased or acquired the business, what made you believe in it? (200 characters max)	
How did you solve it? How are you continuing to improve your solution(s)?	
What inspired your brand name? (160 characters max)	
What sets your brand apart? (160 characters max)	



What are the challenges your brand has faced?

How did you overcome these challenges? What qualities in you or your team allowed you to succeed despite difficulty? *(200 characters max)*

What have been the key milestones in your brand's journey? List three. *(200 characters max)*

In one sentence or less, what is your business mission? *(120 characters max)*

What is your vision? *(120 characters max)*

What are your core values? List three.





7. Align Your Brand & Marketing Strategies

Look at the marketing materials or campaigns you have already done or plan to do. Look at how it is now or how it could best be aligned with your branding strategy.

Marketing Material or Campaign Type	How is it now/could it be best aligned to your branding strategy? Put N/A if you don't believe this is a channel you are planning to pursue. (160 characters max each)
Logo and Tagline	
Collateral (Business Cards, Letterhead, Brochures)	
Website	
Blog	
Business Directories (Google, Yelp, YP, Industry-specific, Other)	



Search Engine Marketing (SEM or SEO)	
Direct Mail	
Email Marketing	
Podcasts	
Video	
Social Media	
Influencer Marketing	
TV	



Radio	
Print (Newspaper, Magazine)	
Public Relations	
Billboard	
Event Marketing	
Promotional Products	
Other	



8. Measure & Refine Your Brand & Marketing Strategies

What metrics are you using or would like to use on your brand to evaluate effectiveness and areas for improvement? You may need to create an expanded version of this list or spreadsheet as the range and complexity of your marketing channels and campaigns grow over time.

Key Performance Indicators (KPIs)	Measuring? (Yes/No/ Maybe)	Plan to Measure? (Yes/No/ Maybe)	Frequency? (Mo, Qtr, Yr)	Goals/Targets?
Business KPIs				
Market Share				
Gross Margin				
Net Margin				
Net Sales				
Revenues				
Gross Profit				
Net Profit				
Marketing KPIs				
Website				
Traffic: Unique Visitors (UV)				
Traffic: Page Views (PV)				



Traffic: PV/UV				
Conversion rate (CVR) for Call-to-Action (CTA)				
Ecommerce Sales				
Ecommerce Revenue				
Return on Investment (ROI)				
Other?				
Email Marketing				
Subscribers				
New Subscribers/Unsubscribes				
Open Rate				
CTR to Website or Offer				
CVR for CTA				
Sales				
ROI				
Social Media				
Impressions				
Views				



Likes/Dislikes				
Comments Positive/Negative				
Reposts				
CTR (to Website or Offer Landing Page)				
ROI (Organic or Paid Social)				
Ad Spend (Online, Social, Print)				
Cost/Budget				
CPM				
Response Rate (Custom URL/ Offer Code to Track)				
Revenues				
ROI				
Brand KPIs				
Awareness				
Consideration				
Preference				
Brand Equity				