

*the*  
BRAND  
STRATEGY

BLUEPRINT

GO FROM CONFUSED AND OVERWHELMED  
TO CLEAR AND CONFIDENT

INTENTIONALLY DESIGNED

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*module one*

# The Prep

LAYING THE GROUNDWORK FOR  
BUILDING A STRONG BRAND STRATEGY

## LESSON ONE

# Imposter SYNDROME *checklist*

This is something we have all struggled with, myself included. We get easily fooled into thinking that everyone else is better than we are and that we aren't qualified enough to do what we do. Follow these steps to overcome imposter syndrome when you feel it hit.

1. **Recognize and Acknowledge It:** The first step in overcoming imposter syndrome is to recognize and acknowledge that you're experiencing it. Understand that it's a common feeling, and many successful people have faced it.
2. **Identify Triggers:** Pay attention to situations or events that trigger your imposter syndrome. It might be when you receive praise, start a new project, or face a setback. Knowing your triggers can help you be prepared.
3. **Challenge Negative Self-Talk:** Replace self-doubt with positive affirmations. When you catch yourself thinking you're not good enough, remind yourself of your achievements and capabilities. Write down your accomplishments and revisit them when self-doubt creeps in.
4. **Set Realistic Goals:** Break your business goals into smaller, achievable milestones. When you accomplish these smaller tasks, it becomes easier to see your progress and feel more confident.
5. **Seek Support:** Share your feelings with trusted friends, family members, or mentors who can provide encouragement and perspective. Sometimes, discussing your fears and doubts can help you realize they're unfounded.
6. **Develop a Growth Mindset:** Embrace the idea that you can always learn and improve. Instead of viewing mistakes as failures, see them as opportunities for growth and learning.

7. **Celebrate Your Wins:** Don't downplay your successes. Celebrate your achievements, no matter how small they may seem. This reinforces your sense of competence and helps counteract imposter syndrome.
8. **Compare Less:** Avoid constantly comparing yourself to others in your industry. Remember that everyone has a unique journey, and success is not one-size-fits-all.
9. **Continual Learning:** Invest in your education and skill development. The more you learn and grow, the more confident you'll become in your abilities.
10. **Practice Self-Compassion:** Be kind to yourself. Understand that nobody is perfect, and making mistakes is a part of the entrepreneurial journey. Treat yourself with the same kindness and understanding you'd offer a friend.

# Deal with IDEA *overload*

When you find yourself overloaded with ideas making it hard to focus, go through this checklist to sort through everything and prioritize what's important.

## STEP 1: BRAIN DUMP

Write everything down. Brain dump it all. Even as you see it on social media or get that idea in the shower. Keep a running list of things. This can be messy and unorganized as long as you get it out of your head.

## STEP 2: PRIORITIZE AND ORGANIZE

Once you have it all in one place, you can organize and prioritize the list.

- Do a quick scan to eliminate anything that sounded good at the moment but you can quickly tell isn't right for you or worth your time and cross it off.
- Then start looking for the needle-moving things next. Pinpoint the profit-generating things on the list so you can focus on those first.

## STEP 3: SCHEDULE IT

Once you nail down the things you need to work on, schedule it. Even if it is important it doesn't mean it has to be done right now. You can add it to your regular schedule so you know it will get taken care of in the next few weeks without disrupting your current workflow and schedule, keeping you on track overall.

## STEP 4: TRACK FUTURE IDEAS

Anything that is tempting and alluring but not going to help with the bottom line can go to a future idea list so you can revisit it later.



# The Shiny Object Scale

Use this shiny object scale to avoid being distracted by those inevitable shiny objects. Once you identify the shiny object, rate each item on a scale of 1 to 5, with 1 being the lowest and 5 being the highest. Be honest and objective in your evaluation. Then add up the scores for each criterion to calculate the total score for the shiny object.

<p>ALIGNMENT WITH YOUR BRAND</p> <p><i>Does this shiny object align with your brand's purpose and values?</i></p> <p><i>Does it resonate with your target audience?</i></p> <p><i>Does it fit within your existing brand messaging and positioning?</i></p>	
<p>FEASIBILITY</p> <p><i>Is it realistically achievable given your current resources (time, budget, skills)?</i></p> <p><i>Can you execute it effectively without compromising other essential aspects of your business?</i></p>	
<p>LONG-TERM BENEFIT</p> <p><i>Will pursuing this shiny object contribute to long-term growth and success?</i></p> <p><i>Does it align with your overall business goals and objectives?</i></p>	
<p>RISK ASSESSMENT</p> <p><i>What are the potential risks associated with this shiny object?</i></p> <p><i>Are these risks manageable, or could they jeopardize your brand's stability?</i></p>	

## *Results Key*

15-20	This shiny object is highly aligned with your brand strategy and has the potential to bring significant long-term benefits. It's worth exploring further.
10-14	This shiny object may have some potential, but it also carries certain risks or may require more resources than you currently have available. Consider carefully before proceeding.
5-9	This shiny object is not well-aligned with your brand strategy and may not be worth pursuing. It could lead your brand off track.
4 or below	This shiny object is unlikely to be a good fit for your brand, and pursuing it may divert your focus from your core brand strategy.

### MAKE AN INFORMED DECISION

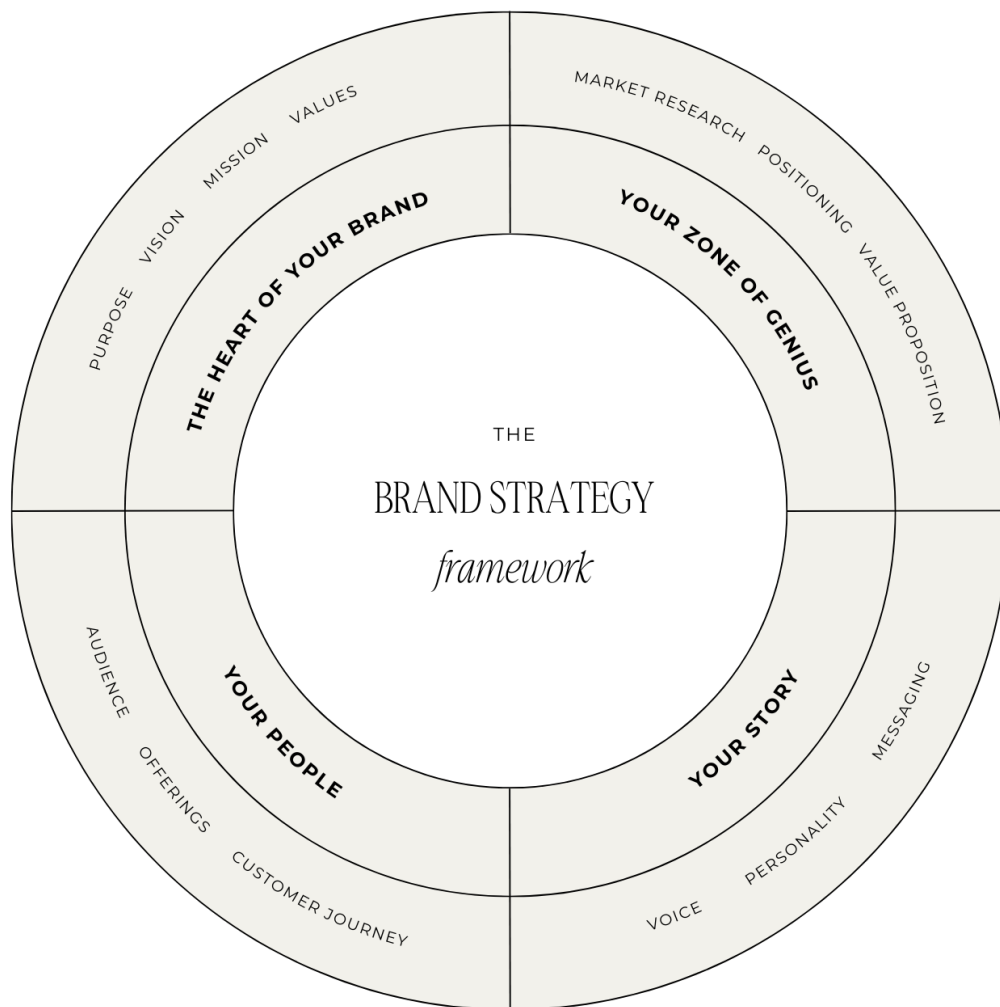
Based on your evaluation and the total score, make an informed decision about whether to pursue the shiny object. Consider your brand strategy, long-term goals, and potential risks carefully before taking action.

Repeat this exercise whenever a new opportunity or distraction arises, and use The Shiny Object Scale to maintain alignment with your brand strategy and avoid getting sidetracked by shiny objects that may not serve your brand's best interests.

## LESSON TWO

# Brand *strategy* FRAMEWORK

Keep this brand strategy framework handy as you work through this process and beyond for an easy understanding of what makes up your brand strategy and how the pieces work together for a strong foundation.



## LESSON THREE

# BRAND *strength* calculator

This assessment can help you visualize where your brand currently stands and identify areas that may need improvement as you work through the brand strategy process. To get an idea of where you are starting with your brand, you can add up your scores to determine your brand's overall strength. Measure each item on a scale of 1-10, one being the lowest, 10 being the highest.

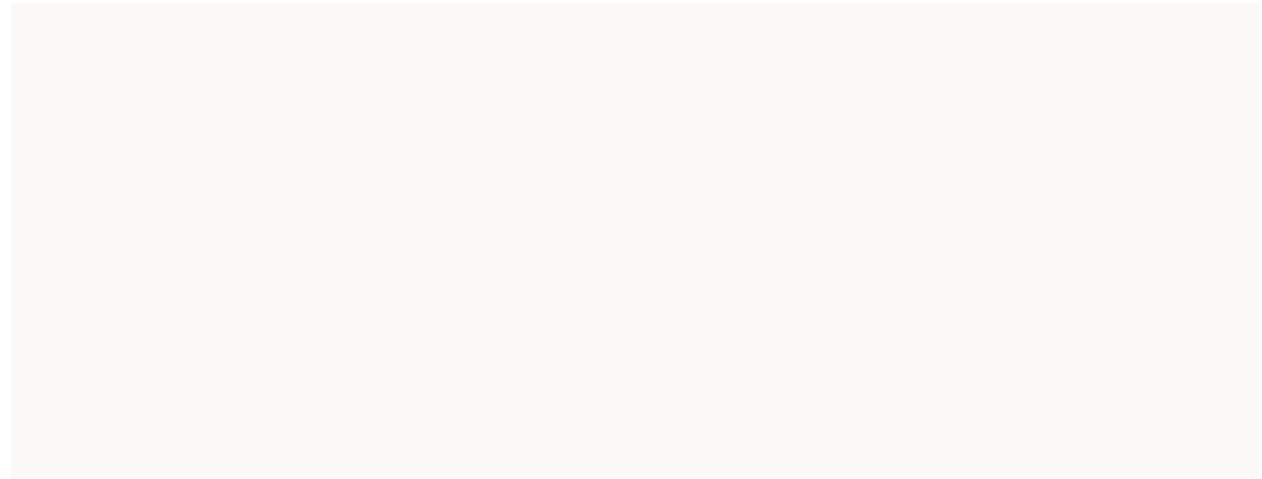
BRAND IDENTITY <i>Clarity and Consistency of Visual Elements</i>	
AUDIENCE PERCEPTION <i>Customer Feedback and Perception</i>	
BRAND VOICE <i>Alignment of Messaging with Brand Values</i>	
MARKET POSITIONING <i>Where Does Your Brand Stand in Your Industry/Niche?</i>	
COMPETITIVE ANALYSIS <i>Strengths and Weaknesses Compared to Competitors</i>	
ONLINE PRESENCE <i>Quality and Optimization of Online Platforms (e.g., website, social media)</i>	
PERSONAL FEELINGS <i>How you feel about the current status of your brand</i>	
<b>Total Brand Strength Score</b>	

## Results Key

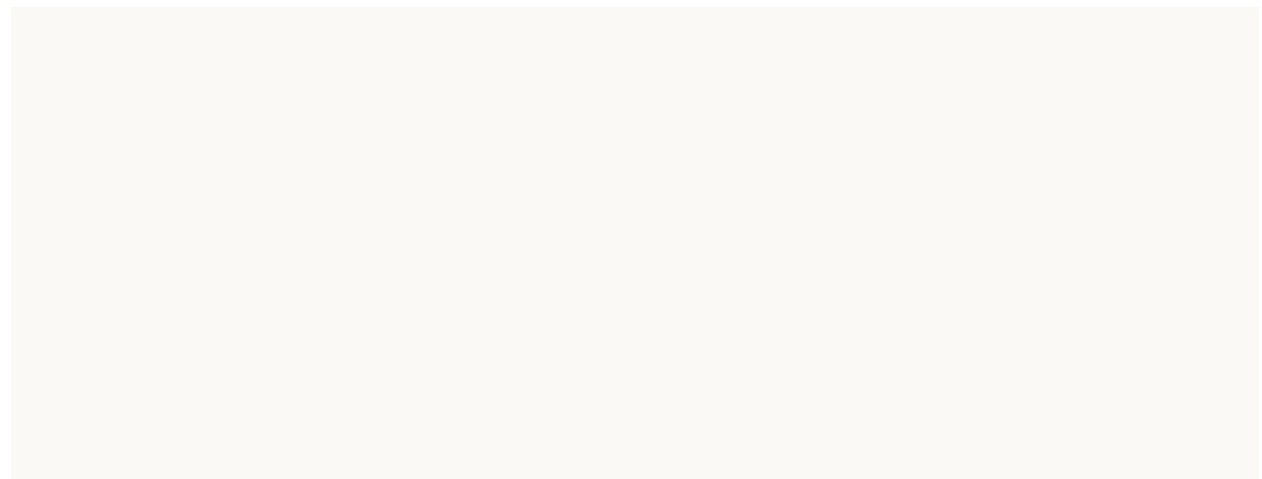
70-100	<p>You have a STRONG brand.</p> <ul style="list-style-type: none"><li>● Your ideal clients know exactly what you deliver and why it's valuable to them.</li><li>● You acquire clients quickly because your leads' experience with you supports everything you say.</li><li>● Maintain consistency and continue delivering value.</li><li>● Focus on realigning your brand strategy for growth and expansion strategies.</li></ul>
40-69	<p>You have a MODERATE brand.</p> <ul style="list-style-type: none"><li>● Your brand is in good shape but has room for improvement.</li><li>● Your audience may not have a consistent impression of your product and business, but in general, it's positive.</li><li>● Work on refining your brand strategy.</li><li>● Enhance your messaging and align it with your values.</li></ul>
0-39	<p>You have a WEAK brand.</p> <ul style="list-style-type: none"><li>● Your brand may be struggling to make a strong impact.</li><li>● You don't have a brand strategy and it shows It's crucial to redefine your brand strategy.</li><li>● What you do, what you say and how you say it may contradict each other and confuse your audience.</li><li>● Concentrate on brand identity, messaging, and audience alignment.</li></ul>

## SETTING YOUR GOALS

Write down both big and small goals that you want to achieve by going through this brand strategy process. Consider goals related to brand awareness, customer engagement, revenue growth, or any other relevant metrics.

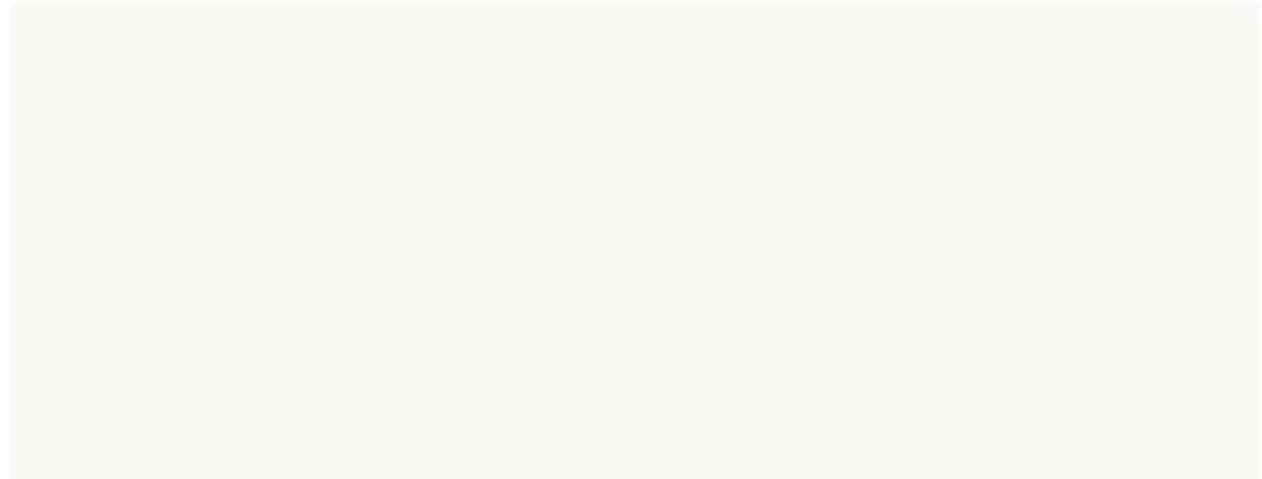


Where do you see your business a year from now? What action steps do you need to take to get there?



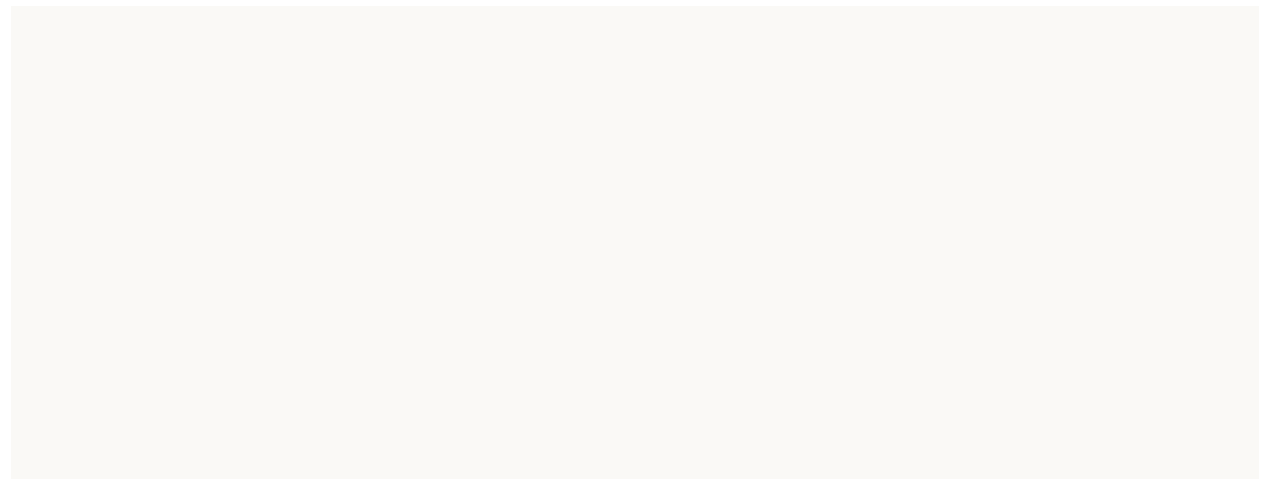
## VISUALIZING SUCCESS

Imagine your business after successfully implementing your brand strategy. What changes do you see? How do your customers perceive your brand? How does your bottom line improve? Paint a vivid picture of your success.



## MILESTONE CELEBRATION PLAN

Create a plan for celebrating your victories, whether they are big or small. Consider rewards, acknowledgments, or even a team celebration. Having this plan in place will help you stay motivated throughout the course.



# 7 metrics to measure your brand STRENGTH as it *evolves*

## **01 CLARITY**

You have a clear message that is easily understood by your ideal audience.

## **02 RELEVANCE**

You solve a current problem that your ideal audience is facing.

## **03 CONSISTENCY**

Your message, voice, and visuals are all consistent and easily recognizable.

## **04 VISIBILITY**

You can be seen and found easily online.

## **05 UNIQUENESS**

You offer a unique perspective and process and you make that clear to your audience.

## **06 CREDIBILITY**

You are known and trusted as someone who will deliver what you promise.

## **07 INTENTIONALITY**

You run your business with purpose and intention and that is clear to your audience.



*module two*

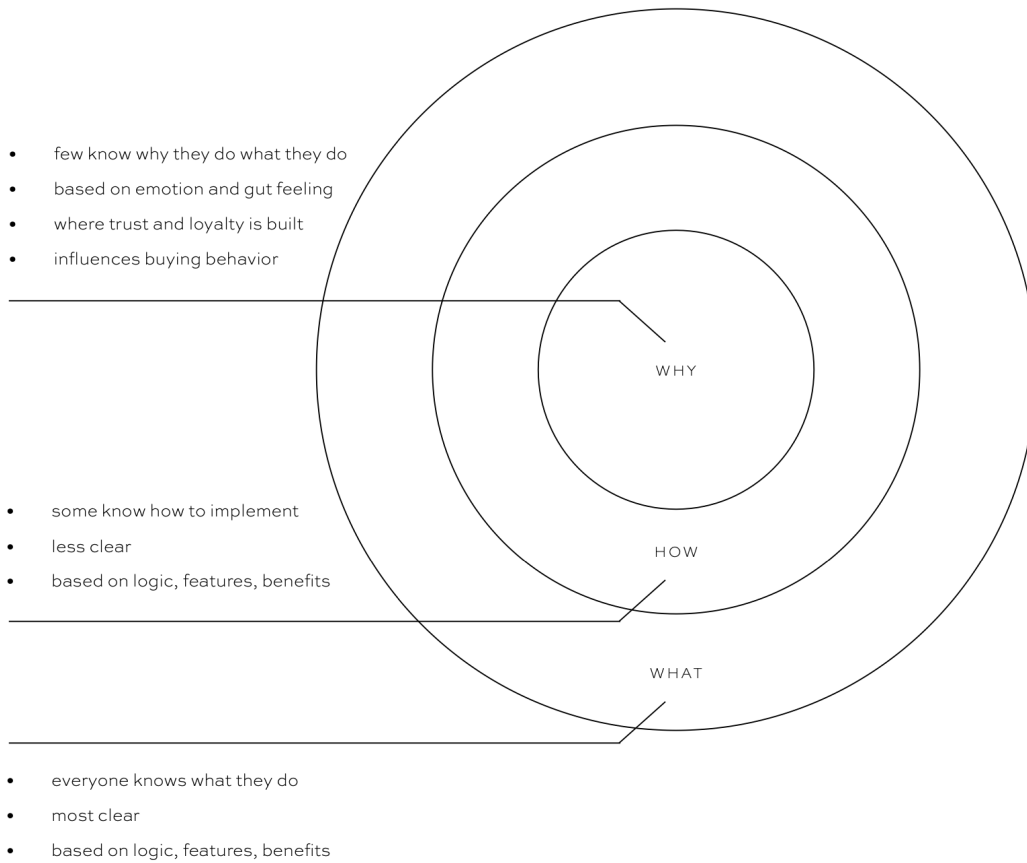
# Your Purpose

DEFINING THE HEART OF YOUR BRAND

# Developing your *brand* PURPOSE

## *Start with WHY*

Typically you know what you do and how you do it but might have a harder time explaining WHY you do it. This WHY goes beyond making a profit but digs deeper into why your business exists and why others should care. Most brands approach their messaging with the what first, but the most inspiring brands start with why. Your customers and clients are looking for what you do but will be more likely to purchase or book with you because of why you do it.



*Find your passion*

Think about what you truly care about or what positive change you want to make in the world.

---

*Connect it to your business*

Figure out how your business can contribute to that passion or make that change happen.

---

*Keep it simple*

Write down your purpose in a short, clear sentence or two. Make sure it's easy to understand.

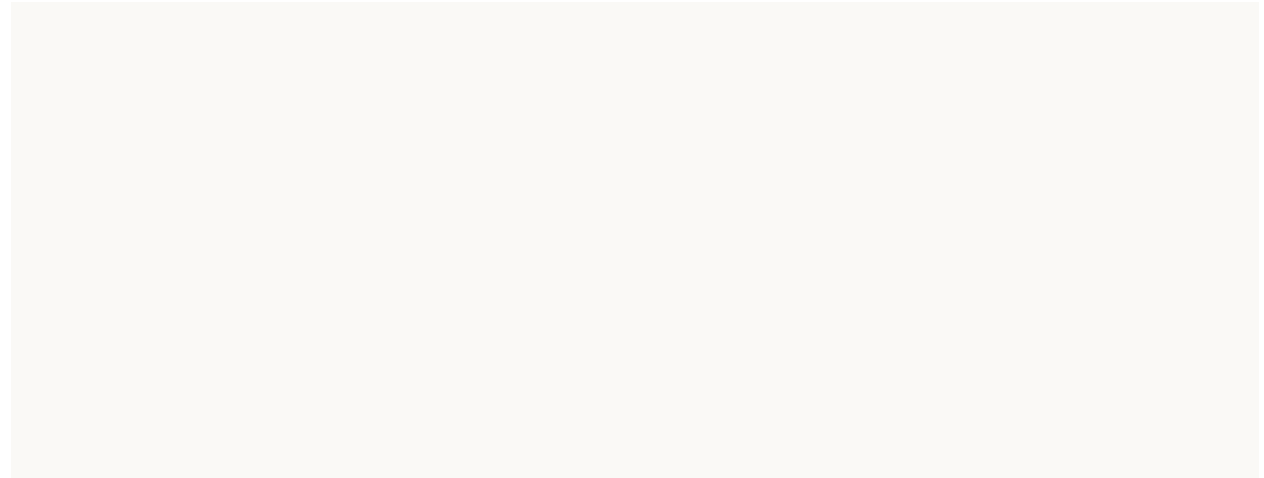
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*Make it inspiring*

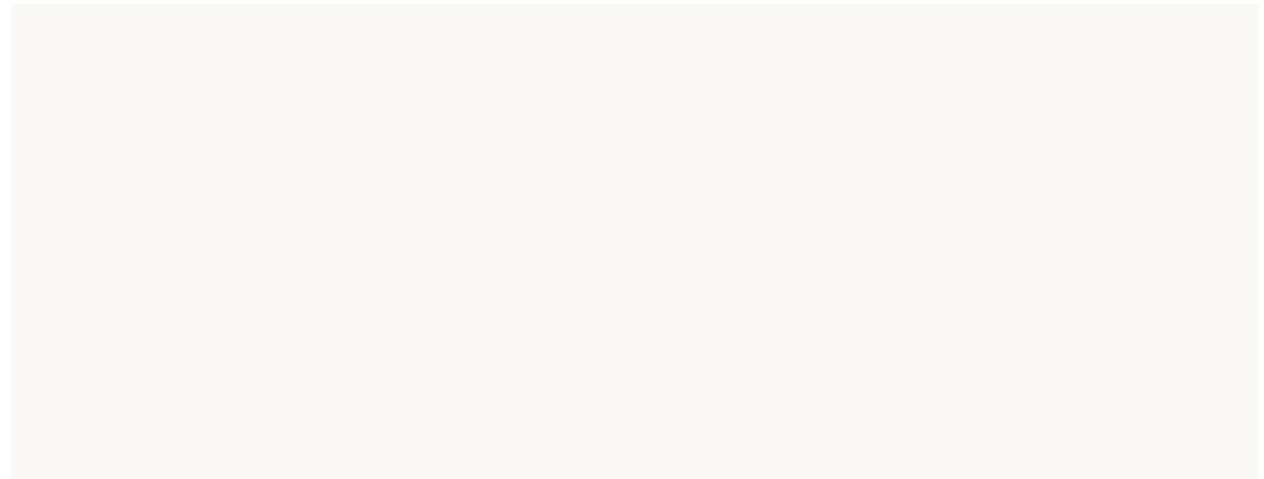
Your purpose should be something that excites you and inspires others. It's like the fuel that drives your brand.

*Ask yourself these questions to help uncover your purpose.*

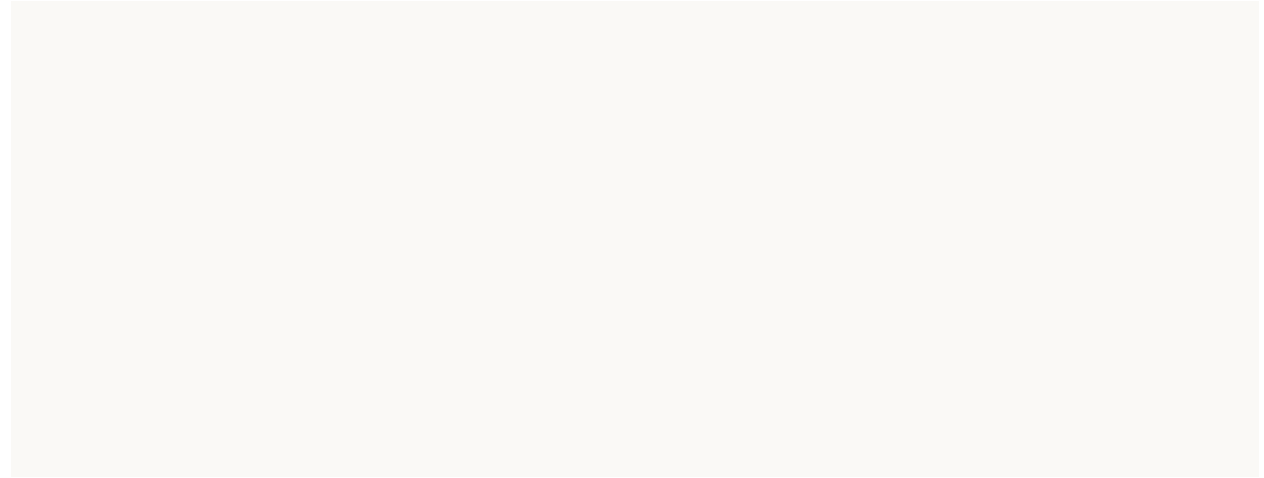
Why does my business exist beyond making money? What positive change or impact do you want to bring to your target audience or the world? Consider why you are in business (ex: financial freedom, flexible schedule, following your passion), and why that matters to your people too (ex: business growth, confidence and clarity, work/life balance).



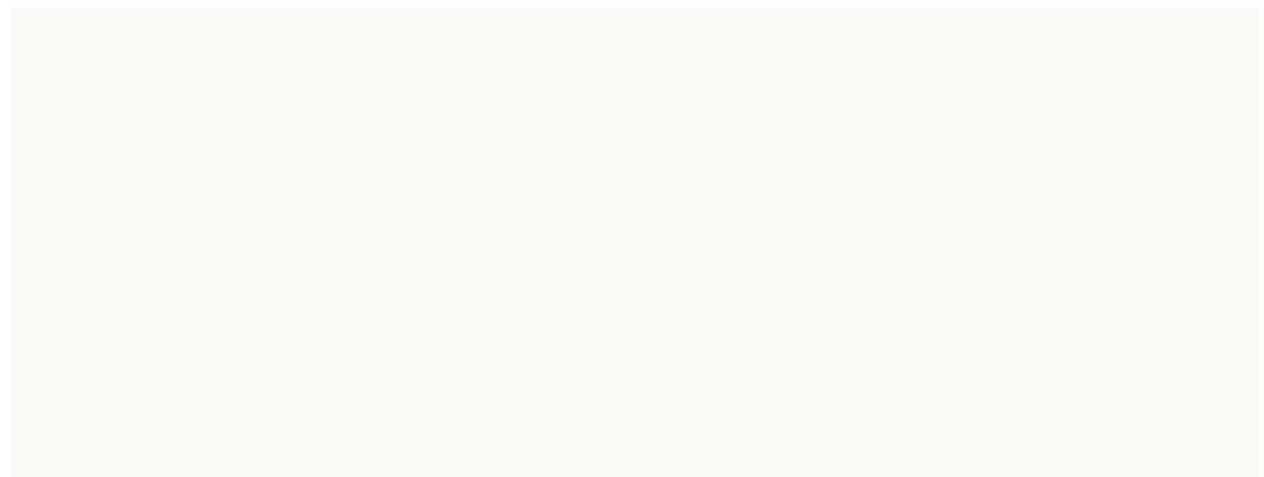
Envision the ideal long-term state for your brand. What are the big-picture dreams and aspirations you're working towards? How do you want your brand to be perceived and what impact do you hope to have in the future?



Consider the core principles and beliefs that guide your brand's behavior and decision-making. What values are non-negotiable for your brand, and how do they influence the way you operate?



Think about the unique value and transformation your brand provides. What results or changes do your customers experience because of your brand? How do you make a difference in their lives?



# Purpose *statement* TEMPLATE

At [Your Brand Name], we [Action Verb] [Target Audience] by [How You Plan to Achieve Your Purpose] to [Long-term Impact].

## EXAMPLES

To inspire and nurture the human spirit – one person, one cup,  
and one neighborhood at a time."

To make a contribution to the world by making tools  
for the mind that advance humankind."

LESSON TWO

# Creating your *brand's* VISION

*Imagine the future*

Think about what you want your brand to become in the long run.

---

*Dream big*

Set ambitious and exciting goals for your brand. Imagine the best version of it.

---

*Be clear and concise*

Write a short, clear sentence or two that captures your brand's ultimate goal.

---

*Inspire others*

Make sure your vision statement is so exciting that it motivates and inspires both you and others who read it.

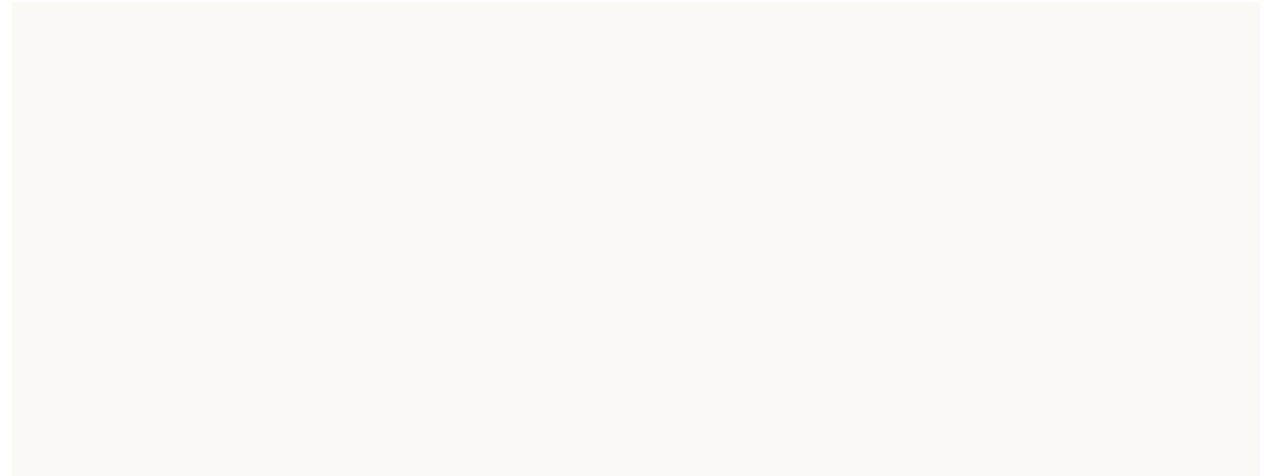
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*Keep it focused*

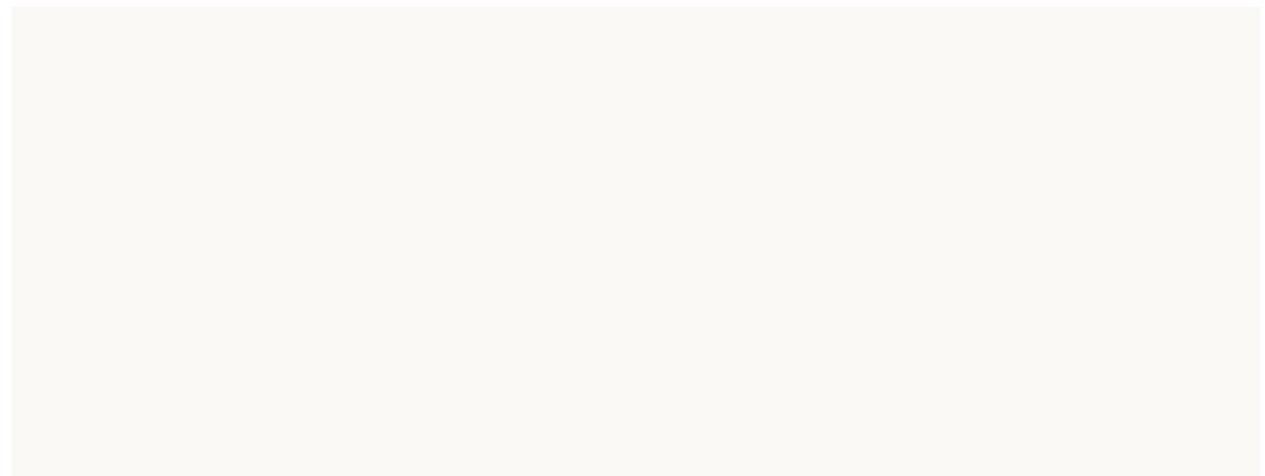
Stay on topic and avoid going into too much detail. Keep it about the big picture.

*Ask yourself these questions to help develop your vision.*

Envision the world where your brand has achieved its mission and made a significant impact. What does this future look like, and what changes have occurred as a result of your brand's work?

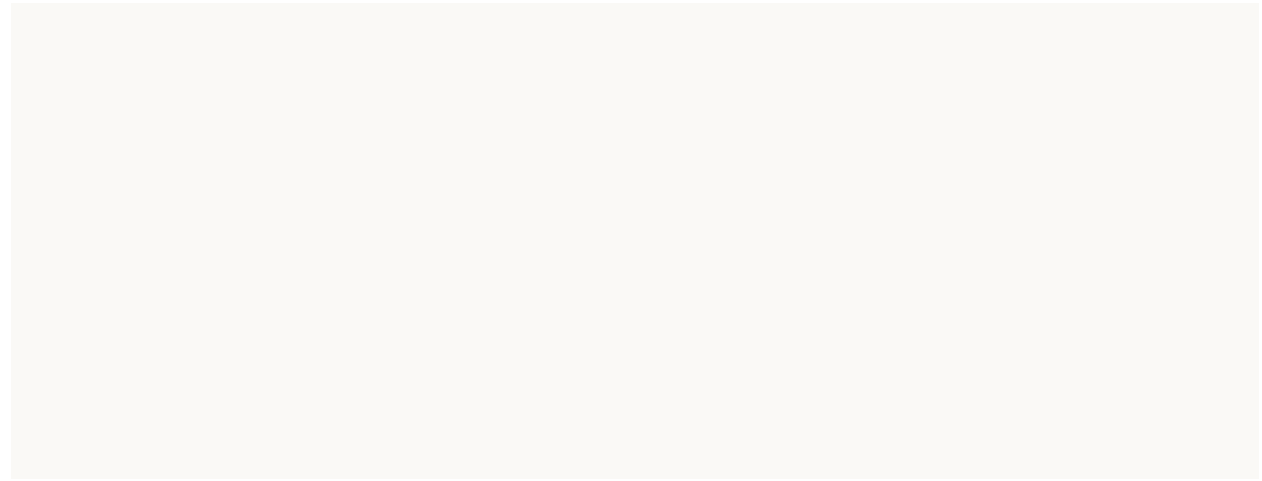


Think about your brand's long-term goals and aspirations. What do you aim to accomplish in the next 5, 10, or 20 years? How does your brand contribute to a better future?

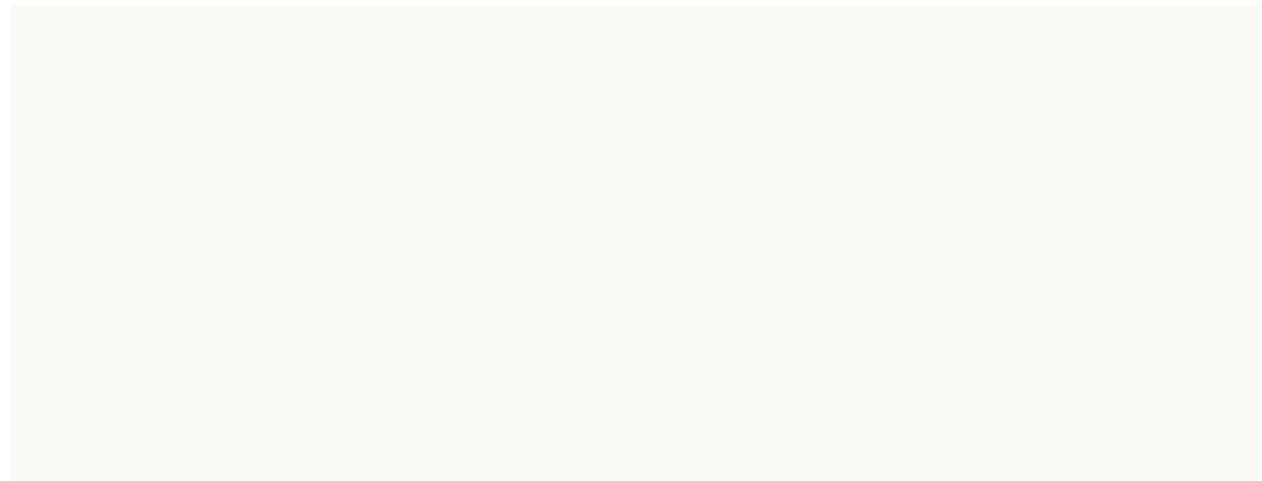




What unique qualities, services, or products does your brand offer that set it apart?  
How do these unique elements contribute to your vision of success?



Describe the positive impact your brand will have on your target audience or the world. How will your brand's success benefit others, and what positive changes will it bring?



# Vision *statement* TEMPLATE

We envision a world where [describe the desired future state or achievement]. Our brand will be known for [mention what sets your brand apart]. We aim to [state the positive impact or change your brand will bring]. Our vision is to [set an ambitious goal or aspiration].

## EXAMPLES

To be Earth's most customer-centric company, where customers can find and discover anything they might want to buy online.

To provide access to the world's information in one click.

## LESSON THREE

# Developing *your* MISSION

*Start with "We are" or  
"Our mission is"*

This sets the stage for your mission statement.

---

*Say what you do*

This is where you describe your main business activity or what your organization specializes in. It's the heart of your mission statement.

---

*Explain who you do it for*

Here, you identify your target audience or the specific group of people you aim to serve. This helps clarify your focus.

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*Add why you do it*

Share the reason or purpose behind your work. Why does it matter?

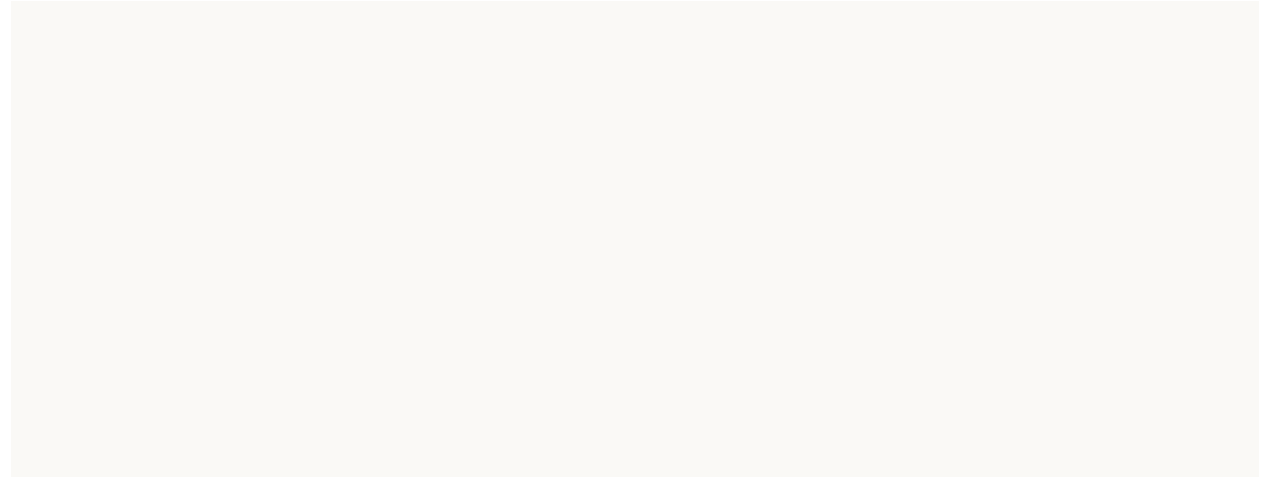
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*Keep it short and clear*

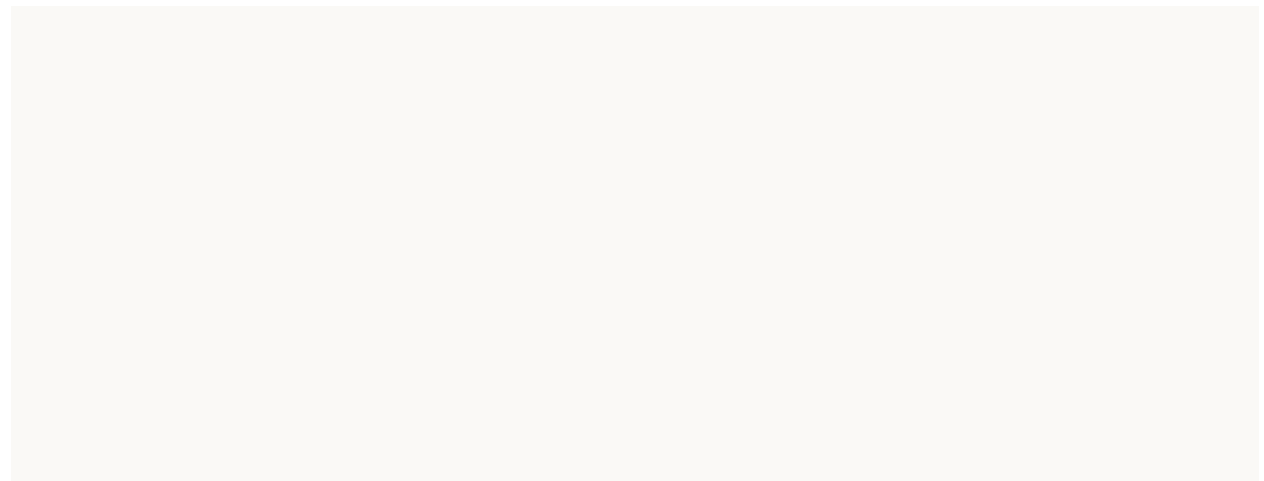
Aim for brevity and clarity. A good mission statement is concise and easily understood by anyone who reads it.

*Ask yourself these questions to help develop your mission.*

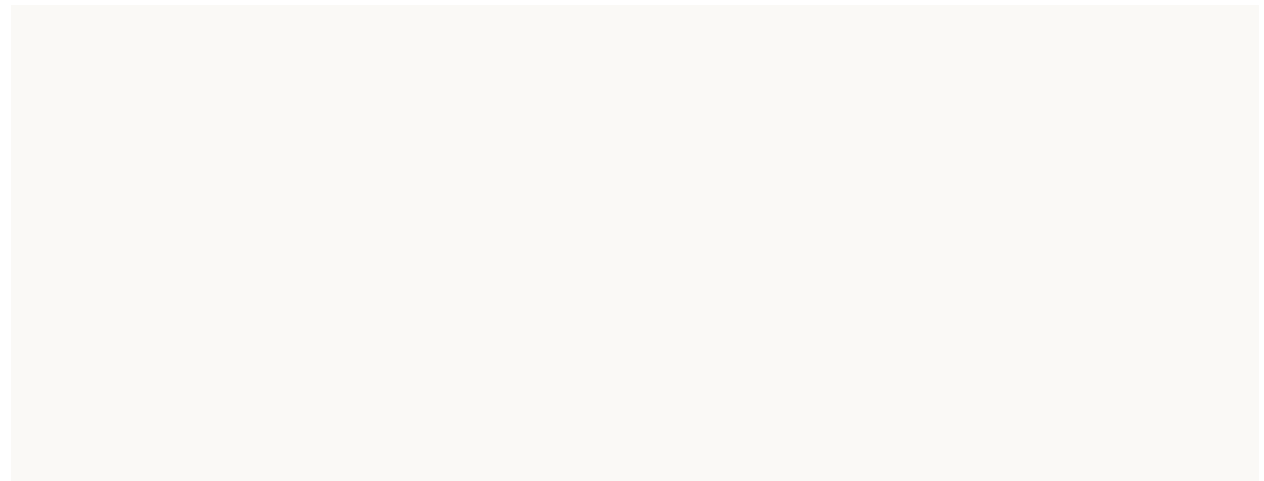
Describe the specific actions and strategies your brand will undertake to fulfill its purpose. Who are you serving, and what unique value are you providing to them?



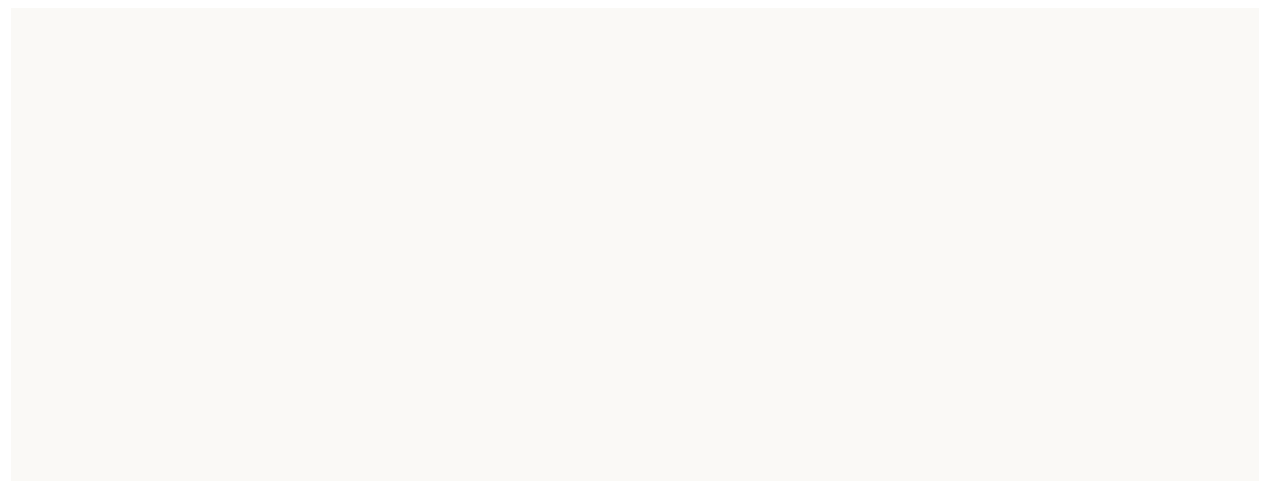
What results or transformation do you provide to your audience or clients? How does your brand contribute to their success or well-being?



Identify the core principles and beliefs that guide your brand's behavior and decision-making. What values are non-negotiable for your brand?



Summarize the commitment you make to your customers based on your values, mission, and the unique value you offer. What promises do you make to your clients or audience?



# Mission *statement* TEMPLATES

At [business name] we [what you do] for [who you do it for]  
because we believe that [what is the value].

At [business name] we [what you do] for [who you do it for],  
[how we do it differently].

At [your brand name], our mission is to [describe your primary  
business activity]. We do this by [explain how you do it, your  
approach, or your values], for [identify your target audience or  
beneficiaries]. Our goal is to [state the positive  
impact or value you provide].

## EXAMPLES

To offer designer eyewear at a revolutionary price, while leading  
the way for socially conscious businesses.

To accelerate the world's transition to sustainable energy.

## LESSON FOUR

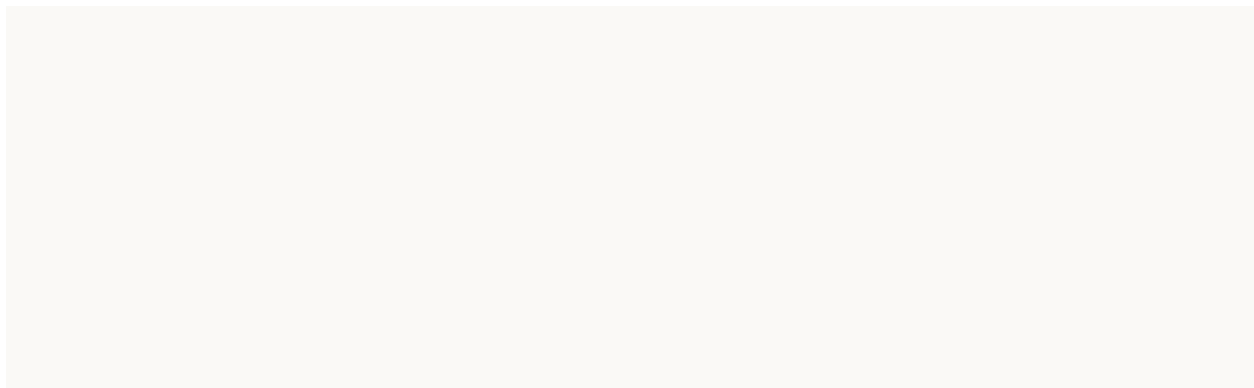
# Defining your *brand* VALUES

Brand values are a set of descriptors for your brand where all communications, actions, goals, and behaviors align. They are how you want the world to perceive you and should be used as guidelines for every decision that you make within your business. Your brand values are one of the many aspects that will set you apart from your competitors and help you to carve your own unique path in your industry.

### *Step one: Brainstorm*

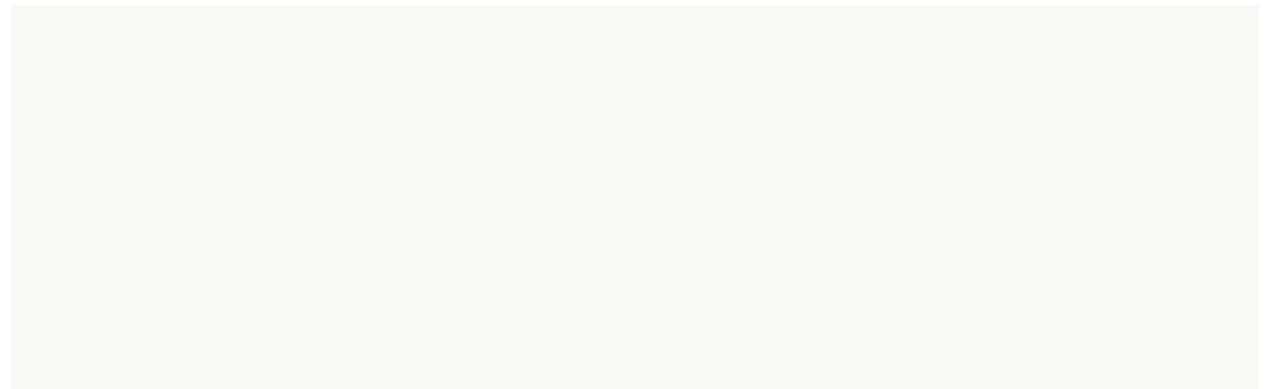
#### LOOK AT WHAT YOU'RE ALREADY DOING

Think of some of the positive things you are already doing/or plan to do as a brand that set you apart. Maybe you always include a handwritten letter with product sales, even if it takes a little longer to pack shipments that way. This might mean that you value connection. Write down any values that come to mind on the list page.



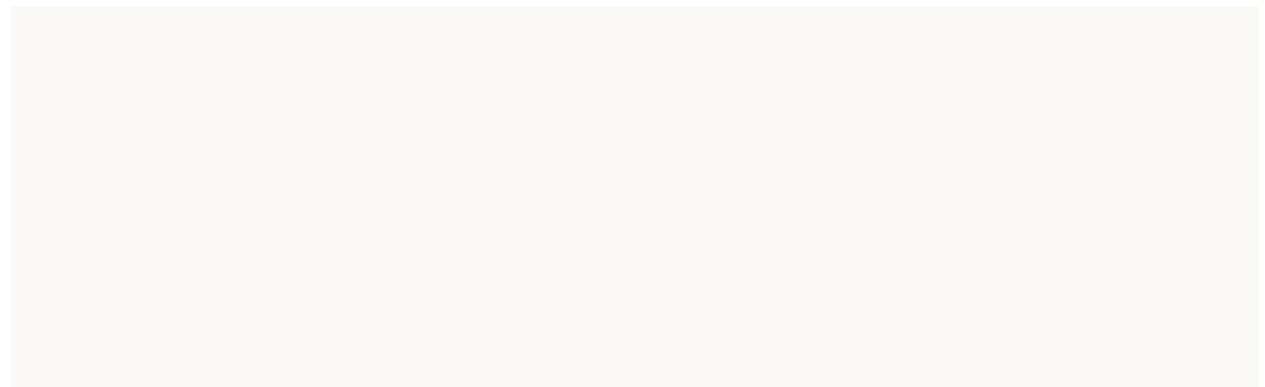
## REFLECT ON NEGATIVE EXPERIENCES

Now think about some of the negative experiences you've had in your business (or that you've had as a customer). Maybe it was a customer who thought it was okay to text you at all hours of the day and expected an immediate response. If that bothered you, you likely value your freedom away from your business. Write down anything that comes to mind.



## LOOK TO BRANDS YOU PERSONALLY LOVE

What are some brands you love? What are some of their qualities that make you love them? Is it their sleek packaging design that you love opening? The hilarious email newsletters they send out? Their perfectly curated catalogs? Whatever it may be, figure out what makes them special to you and identify what values those special things are aligned with and write them down.





## DIVE DEEPER

Now, think about some other things that are really important to your brand. Get your team involved if applicable and right down all the ideas that resonate. Expand on these ideas and find related values that may resonate even more. Write down everything that comes to mind. We will refine later.

## *Step two: Refine*

### BE HONEST

Now, go through the list you've put together and cross out anything that isn't actually THAT important to you. You've likely included some things that sound nice, but at the end of the day, aren't actually that important to your brand or your audience. If you second guess it, it doesn't belong there.

### LOOK FOR REDUNDANCIES

Next, look to see if there are any values remaining that are similar. Can these be better combined under one core value? If so, cross off the unused one. For instance, maybe you value both "ease" and "simplicity". Narrow it down to the one that resonates with your brand the most or find a new word that encompasses both.

## GET SPECIFIC

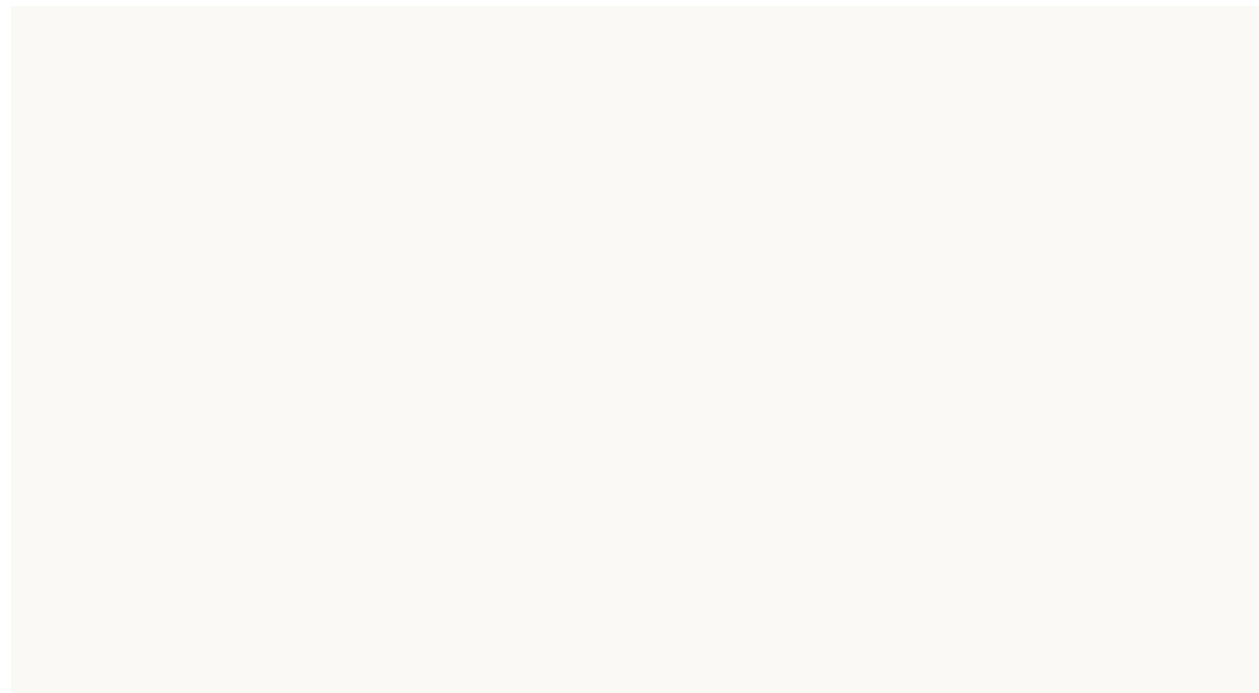
You'll have more clarity and resonate more with your audience if you get super specific with your values. Look for values that feel vague and try to dive deeper and really fine tune them. For example, rather than having a value of "Quality", think of how you'll provide that quality. Maybe its "Attention to Detail" or "Only the best materials".

## VISUALIZE

Go through your list and visualize how you are able to weave these values into your brand's story. Are there any that feel out of place? If so, cross them off.

### *Step three: Define*

Start by determining the most important core value to your brand. Looking at your list, if you could only focus on ONE of the values listed, what would it be? This is your first core value. Write it down in the box and expand on what it means to your brand. What would the next one be? Continue to list out until you've got your top 5.



## *Brand values bank*

Abundance	Care	Devotion
Acceptance	Change	Dignity
Achievement	Charity	Diligence
Accessibility	Clarity	Directness
Accountability	Collaboration	Discipline
Accuracy	Comfort	Discovery
Activeness	Commitment	Dreams
Adaptability	Communication	Drive
Adoptability	Community	Duty
Advocacy	Compassion	Eagerness
Adventure	Confidence	Ease of use
Affection	Connection	Economy
Ambition	Consistency	Education
Appreciation	Contentment	Effectiveness
Approachability	Cooperation	Empathy
Attention to detail	Courage	Empowerment
Balance	Credibility	Encouragement
Beauty	Curiosity	Energy
Belonging	Customer Satisfaction	Engagement
Boldness	Dedication	Enjoyment
Bravery	Dependability	Entertainment
Capability	Determination	Enthusiasm

Entrepreneurship	Growth	Kindness
Environment	Guidance	Knowledge
Equality	Happiness	Leadership
Evolution	Hard work	Learning
Excellence	Health	Legacy
Excitement	Heart	Longevity
Fairness	History	Love
Faith	Honesty	Loyalty
Family	Hope	Mindfulness
Fearlessness	Humility	Mindset
Fitness	Humor	Motivation
Flexibility	Imagination	Optimism
Focus	Impact	Organization
Freedom	Individuality	Originality
Friendship	Innovation	Partnership
Fulfillment	Insight	Passion
Fun	Inspiration	Patience
Generosity	Integrity	Perception
Genius	Intimacy	Persistence
Genuineness	Intuition	Personal development
Goodwill	Joy	Support
Gratitude	Justice	Sustainability
		Tradition

## LESSON FIVE

# Crafting your *brand* PROMISE

*Understand what you can do*

Think about what you're really good at and what you can consistently deliver to your customers.

---

*Think about what your customers need*

Consider what your customers want and how your product or service can meet those needs.

---

*Be clear and straightforward*

Write down a simple, clear statement that tells your customers exactly what they can expect when they choose your brand.

*A brand promise should include one or more of the following aspects. Decide which ones you want to include in your promise:*

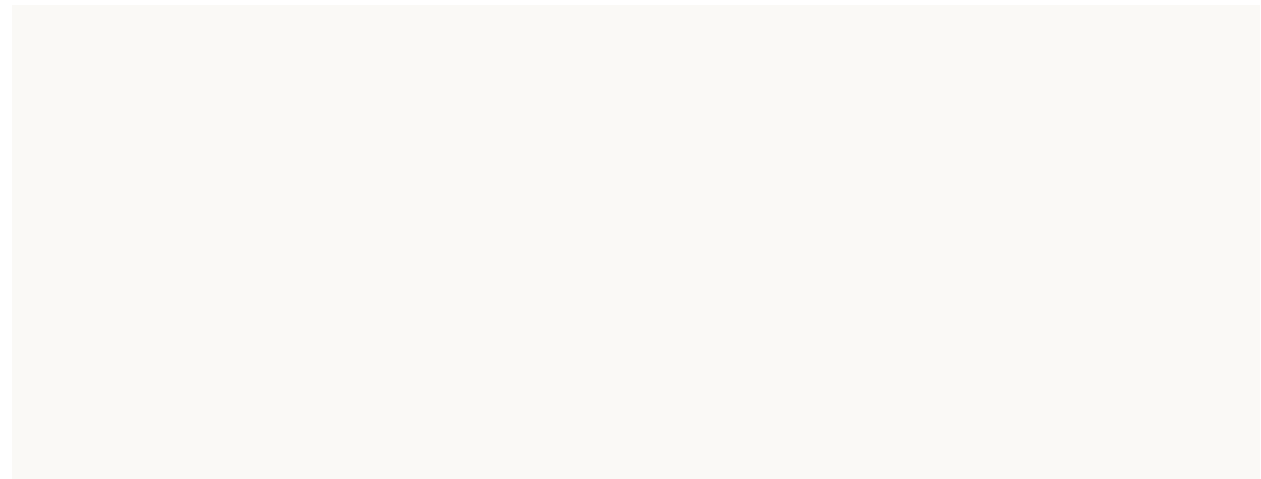
- Truthful
- Credible
- Relevant
- Clear
- Different
- Impactful

*Ask yourself these questions to help develop your promise.*

Identify what you excel at and can consistently provide to your customers. What sets you apart from the competition in terms of skills, knowledge, or capabilities?



Think about your customers' needs and desires. How can your product or service fulfill those needs or wants effectively? What specific problems are you solving for them?



Craft a straightforward and concise statement that communicates exactly what customers can expect when they choose your brand. How will your expertise and solutions meet their needs and make their experience exceptional?



# Brand *promise* TEMPLATES

We promise to provide [your solution/system/framework] for [who] that will [outcome/results].

At [Your Brand Name], we [Unique Expertise/What You Do Best], providing [Customer Needs/Desires] with [How You Fulfill Their Needs]. Our commitment is to consistently deliver [Specific Benefits] that [Customer Value or Aspiration]. When you choose [Your Brand Name], you can expect [Clear Commitment].

## EXAMPLES

We promise to serve you the best cup of coffee every time.

We craft compelling and authentic sales copy that drives action, fosters trust, and delivers measurable results for coaches and educators.



*module three*

# Your Positioning

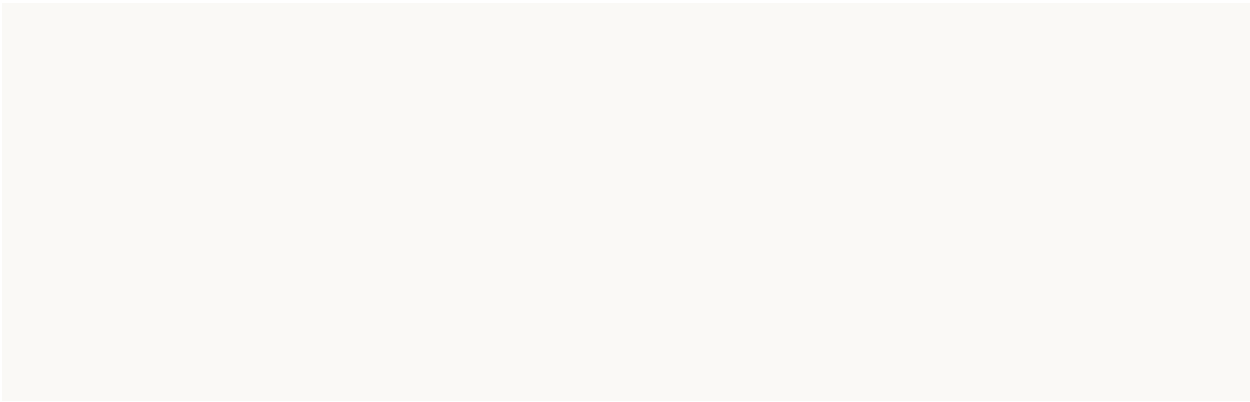
SIMPLIFY THE PROCESS OF  
STANDING OUT IN THE MARKET

## LESSON ONE

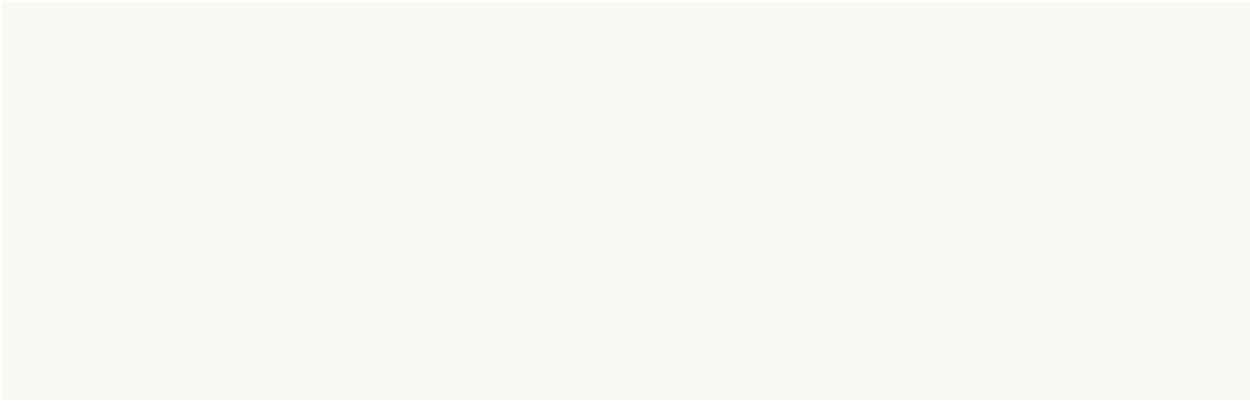
# Conducting *market* RESEARCH

### *Primary research*

Briefly describe your ideal client demographics (age, gender, location, income). List their common challenges and pain points. *Remember you will dive into this more in the next module and can go back and forth between these two things for deeper research.*



Briefly describe your ideal client's lifestyle, interests, and hobbies. Explore their values, beliefs, and motivations. Understand their goals and aspirations. *Remember you will dive into this more in the next module and can go back and forth between these two things for deeper research.*



## CONDUCT SURVEYS + INTERVIEWS

Choose your questions. Use this list as a starting point and determine what questions you'll ask in your surveys and interviews. Make sure to include the name, age, and location for each person you interview. Allow time for further questions on their end. Don't forget to thank them for their time and confirm their address to send a thank-you note or incentive.

Describe a typical day in your life.

What are the highlights of your day, and what frustrates you?

Describe your ideal day or dream life.

What changes are needed to make your life more like your dream life?

What's holding you back from achieving your ideal life?

Share your recent successes, what led to them, and recent challenges you faced.

What are your hopes and dreams for the near future, and what's needed to realize them?

What has made you feel angry or frustrated in the past year?

If you suddenly had \$10,000, how would you use it?

If you had an extra hour in your day, how would you spend it?

If you had a free day, what would you do?

What motivates you when you're feeling unmotivated, and what causes demotivation?

What's the most important thing in your life?

What's the last thing that made you laugh?

How do you relax and unwind?

Describe your favorite restaurant and why it's your favorite.

What professional achievements are you most proud of, and who inspires you professionally?

Share the last significant purchase you made and what influenced your decision.

Describe the last challenging decision you had to make and how you made your choice.

Do you prefer a quiet night in or a big night out?

What's your top priority: family, work, social life, or something else?

What's more important to you: price or quality?

Would you consider yourself an optimist or a pessimist?

Would you rather have more time or more money?

Do you enjoy trying new things or prefer sticking to what you know?

## *Where to find people to survey*

Reach out to your former customers and clients. Ask for just 20 minutes of their time.

Look to your existing audience. Send out an email with an invitation for one-on-one calls.

Add a call-to-action inside a blog post. It's helpful if the blog post includes content that is similar in topic to what you will teach in your course.

Post on social media. In just a few sentences let your community know who you are looking to talk to, and make it incredibly easy for them to get on your calendar for a chat.

Look for people who have purchased products that are aligned with your course idea. (Check out product reviews. It's ok to reach out to a stranger. Most people like being helpful and sharing their opinions.)

A Facebook Group is an ideal place to find good candidates to talk to. However, if you discover a group that is connected to another course creator whose course is similar to the one you hope to create, do not join that group and poach off their students.

Email your peers and let them know the plan. Tell them who your ideal audience is (be brief) and ask if they can put you in touch with a few people who might be willing to answer a few questions for you.

## *Helpful Resources*

### SURVEYMONKEY

A popular online survey tool that allows you to create and distribute surveys, collect responses, and analyze results.

### GOOGLE FORMS

A free tool from Google for creating surveys and questionnaires. It integrates seamlessly with other Google products.

### TYPEFORM

Known for its visually appealing and interactive surveys that provide a better user experience.

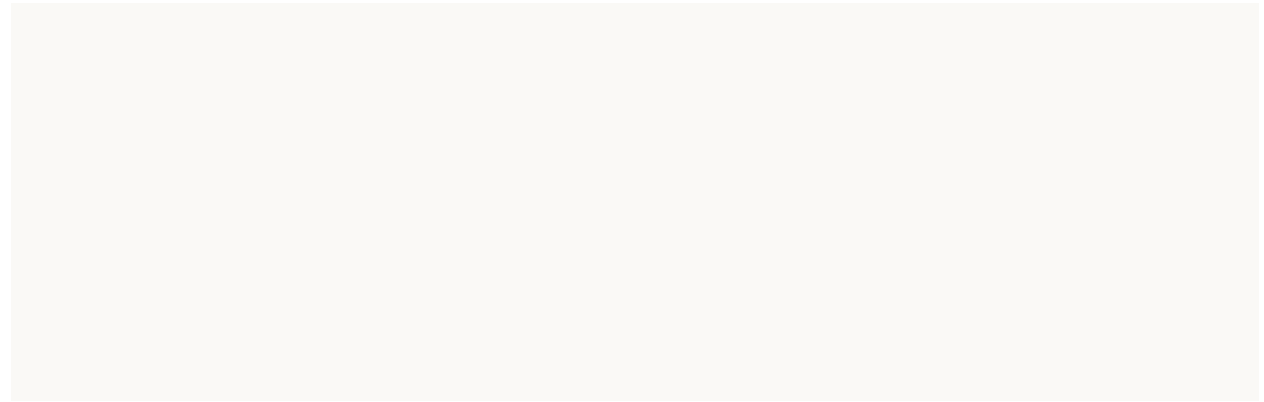
### ZOOM

A widely used video conferencing platform that allows you to conduct online interviews and record them for later analysis.

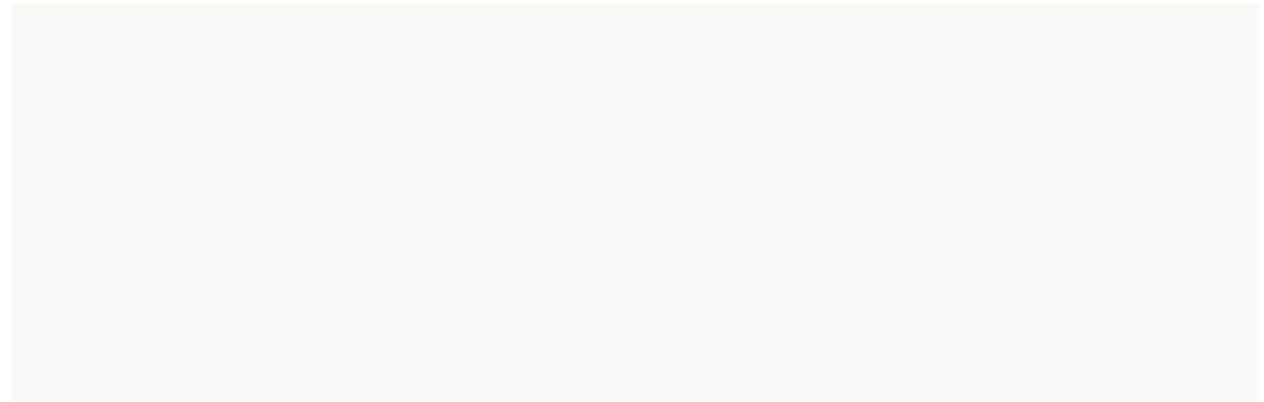
## ANALYZE THE DATA

You want to make sense of it and pull out the key information that will help you build a more effective brand strategy. Answer these questions to find common themes in your results.

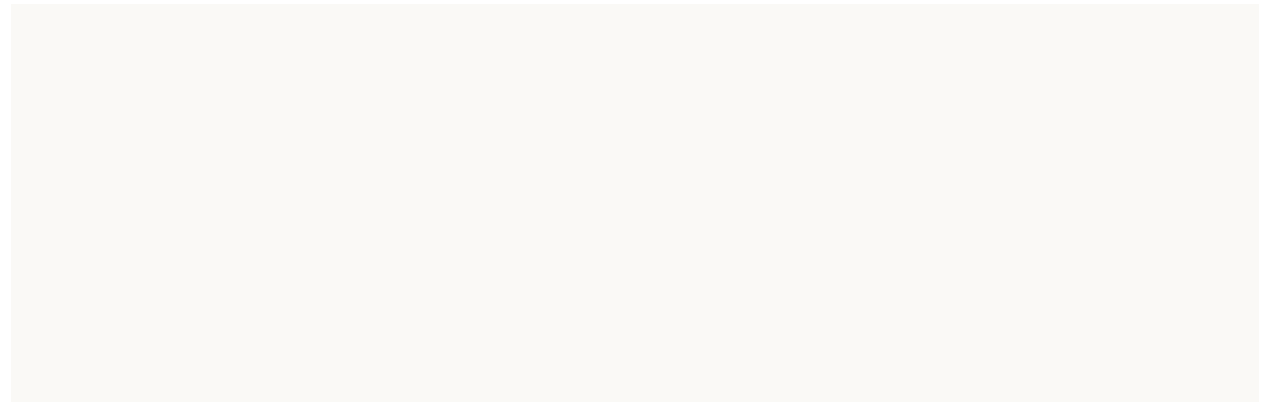
When you think of your ideal audience, what are 3-4 points that describe who they are and what they want?



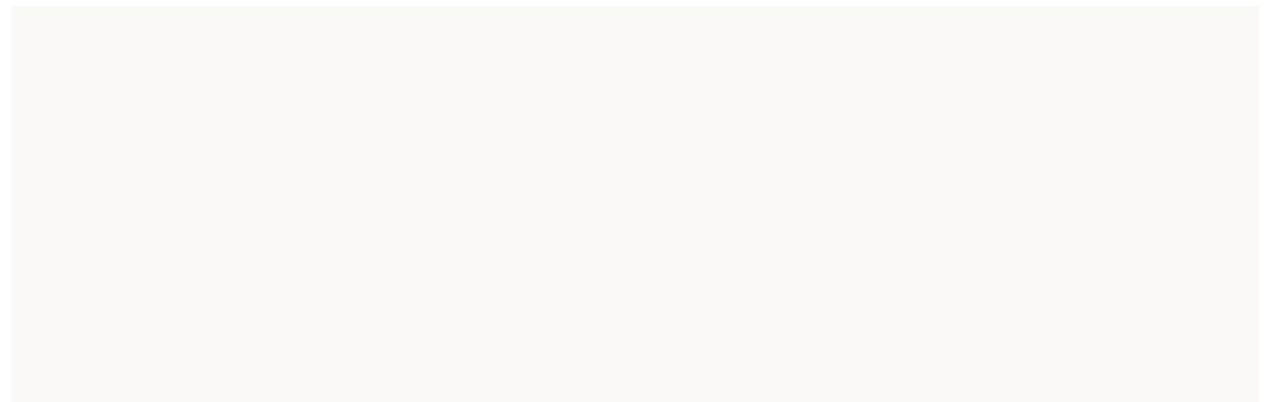
What is the most common result those who did your market research want?



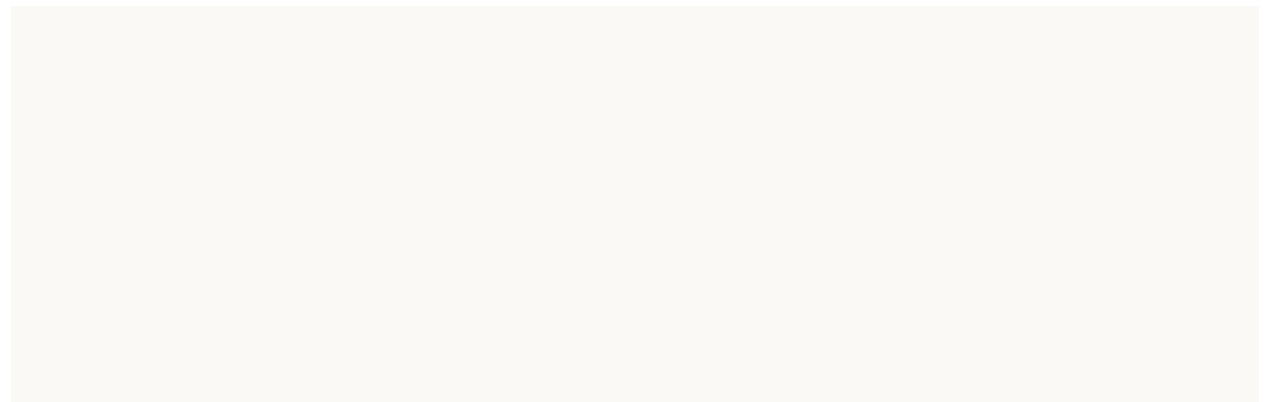
Now that you have that common result, why do you believe they want that result?



What will it do for them?

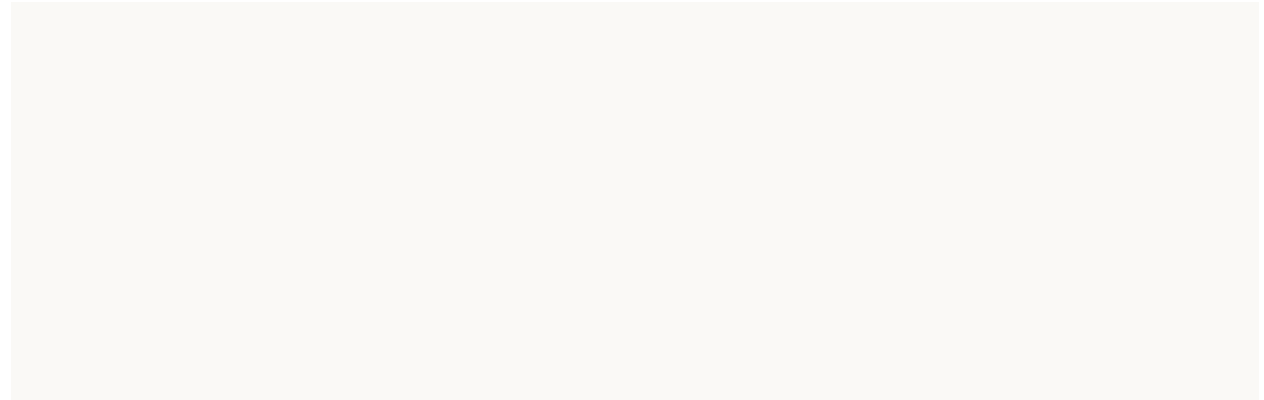


Based on those who want the common result: What are the 3-4 most common struggles they are having with achieving that result? What do they believe is in their way?

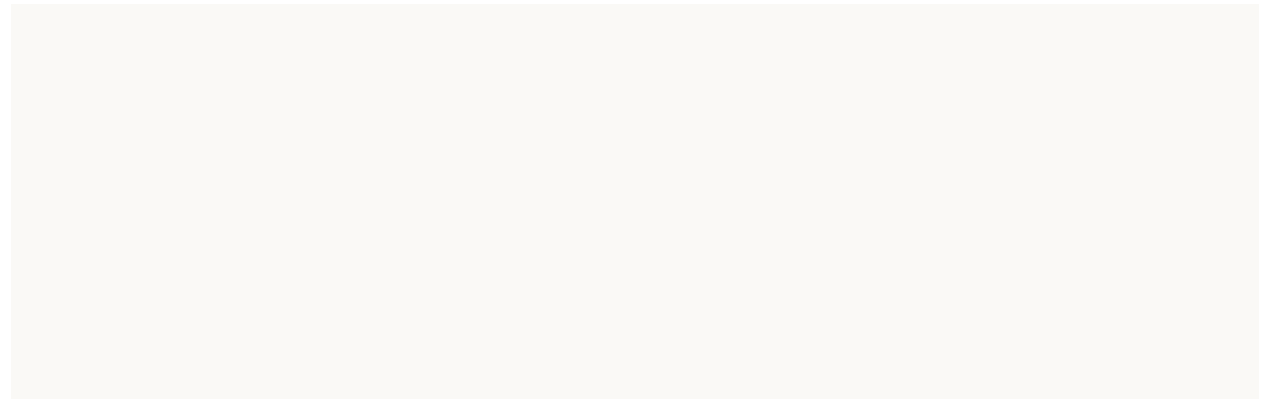




Based on those who want the common result: What are the most common words they are using?



Based on those who want the common result: What ideas come to mind as to how you can help them overcome their biggest struggles? What can they learn from you that will help them achieve the result they want?



## *Secondary research*

### RESEARCH MARKET TRENDS + INSIGHTS

#### Online Research

Leverage the power of the internet. Here are some examples:

- Google Trends: Use this tool to explore search trends related to your niche.
- Industry Websites: Visit industry-specific websites and blogs for insights and reports.
- News Sites: Keep an eye on news websites for stories related to your industry.
- Market Research Reports: Look for market research reports from companies like Statista, IBISWorld, and Nielsen.

#### Social Media Monitoring

Monitor social media platforms for discussions and trends related to your industry. Use tools like Hootsuite or Mention to track keywords and hashtags.

#### Professional Networks

Join professional networks like LinkedIn and participate in industry-related groups. Engage in discussions and observe what others are sharing.

#### Networking

Attend industry events, conferences, and webinars. Connect with experts and peers who can share their insights on current trends.

## Email Subscriptions

Subscribe to newsletters, email lists, and blogs related to your industry. These resources often provide updates on emerging trends.

## Analytics Tools

Use web analytics tools to understand what types of content on your website are most popular. Google Analytics, for example, can show you which pages are getting the most traffic.

## Trend Reports

Several websites publish trend reports. Examples include TrendWatching, Mintel, and WGSN. These reports can provide valuable insights.

## Podcasts and Webinars

Listen to industry-related podcasts and webinars. Industry experts often share their perspectives on current trends.

## *Helpful Resources*

[Google Trends](#)

[Statista](#)

[Nielsen](#)

[Hootsuite](#)

[Mention](#)

[TrendWatching](#)

[Answer the Public](#)

[Google Search Console](#)

[Keywords Everywhere](#)

[Chat GPT](#)

## CONDUCT A COMPETITIVE ANALYSIS

Conducting a competitor analysis is a crucial step in understanding your competitive landscape and making informed strategic decisions for your brand. Use this analysis as a snapshot of your business's potential and get an idea of what others are doing in your industry. Be careful not to copy or compare yourself too closely, just use this as a way to understand your place in the industry.

### *Step one: Identify Your Competitors*

Make a list of your direct and indirect competitors. Direct competitors offer similar products or services, while indirect competitors might serve the same target audience but with different solutions. List the top 3-5 competitors that you want to research.

01	
02	
03	
04	
05	

### *Step two: Gather Information*

Examine your competitor's website and customer experience. This information can be obtained from various sources, including their websites, social media profiles, annual reports, news articles, and reviews.

To start, take a close look at the following items:

- **Offerings:** What products or services do they offer? What are customers really buying from them?
- **Target Audience:** Who are their primary customers?
- **Pricing:** Evaluate their pricing strategy. How do their prices compare to yours? Are they positioning themselves as low-cost providers, premium brands, or something else?
- **Positioning:** How are they differentiating their product from their competition? What features and benefits do they highlight the most in their marketing copy? What makes their product or service unique (according to them)? Identify unique selling points (USPs) and key value propositions they use to attract customers.
- **Marketing and Branding:** Analyze their messaging, branding, and marketing strategies. Identify their market positioning. Review their content marketing efforts, including blogs, social media content, videos, and other promotional materials.
- **Online Presence:** Review their website, social media presence, and online reviews.
- **Customer Feedback:** Check customer reviews and testimonials to understand customer sentiment. Analyze the customer experience they provide, including customer service, response times, and overall satisfaction.

COMPETITOR	NOTES


### *Step three: SWOT Analysis*

Perform a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) for each of your competitors.

*Strengths: Identify what your competitors excel at.*

*Weaknesses: Pinpoint areas where your competitors fall short.*

*Opportunities: Determine market trends or gaps that your competitors haven't addressed.*

*Threats: Recognize potential challenges and threats they face in the market.*

COMPETITOR	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS

*Step four: Differentiation and Positioning*

Assess how your competitors position themselves in the market and how they differentiate from one another. Identify unique selling points (USPs) and key value propositions they use to attract customers.

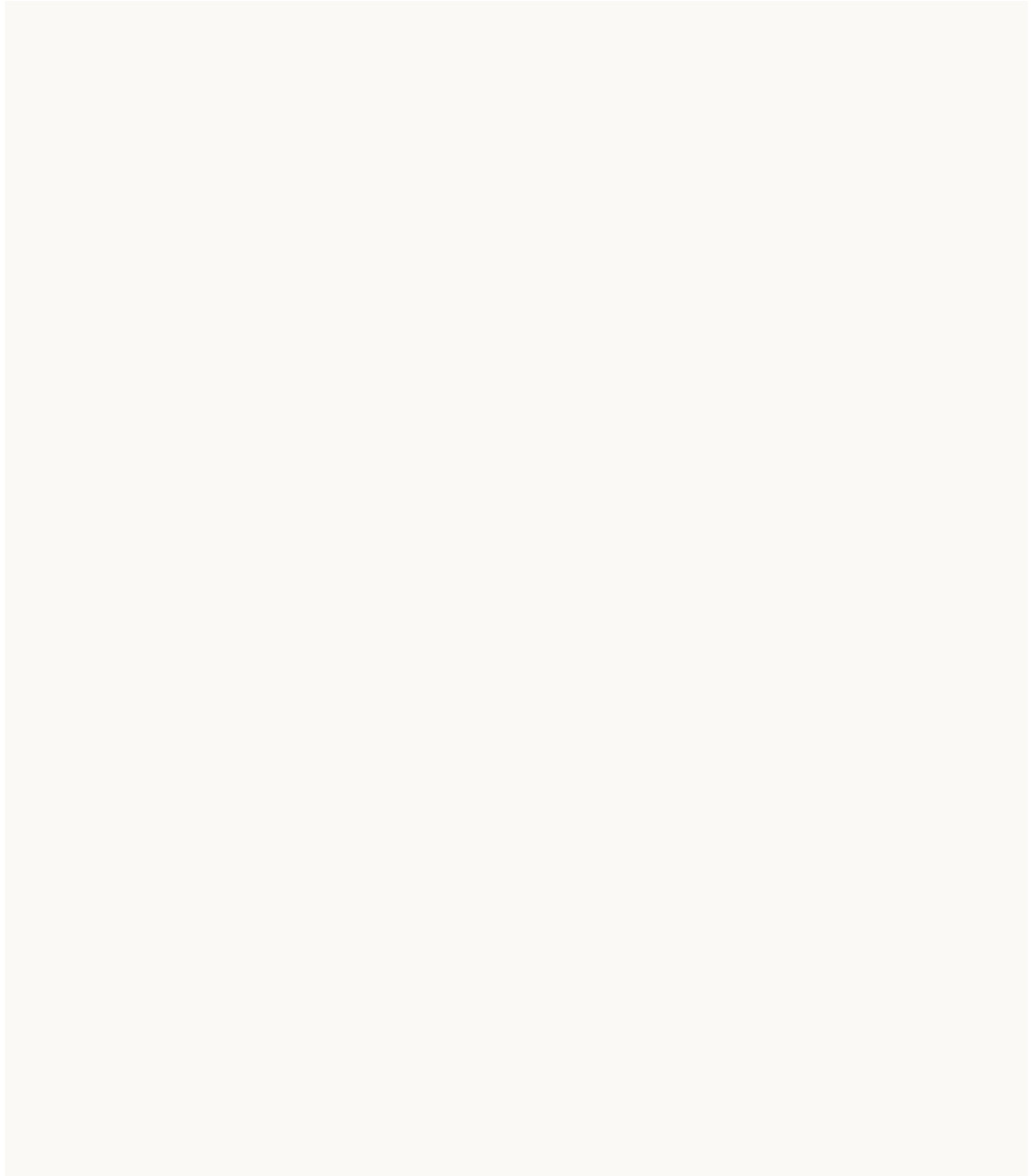


COMPETITOR	NOTES

*Step five: Analyze results*

Summarize your findings and draw conclusions about the competitive landscape. Identify areas where you can capitalize on your competitors' weaknesses and leverage your strengths. Based on your analysis, develop a strategic action plan to improve your brand's competitiveness. This may include adjusting your pricing, refining your

marketing, enhancing your products or services, or targeting new customer segments.

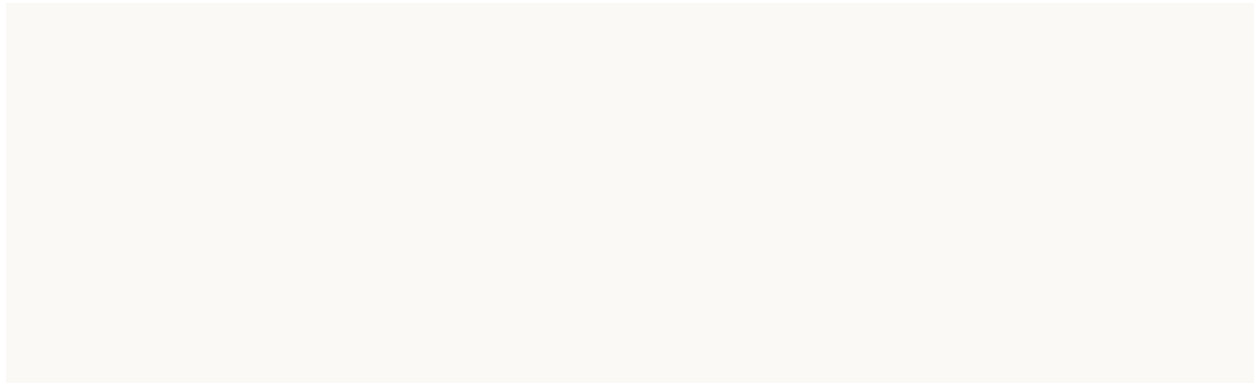


LESSON TWO

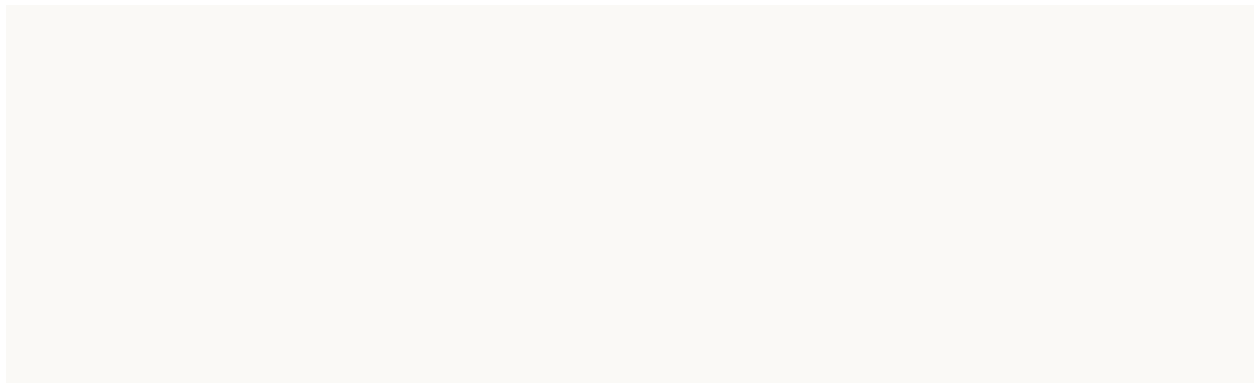
# Positioning *your* BRAND

## FIND YOUR UNIQUE VALUE PROPOSITION

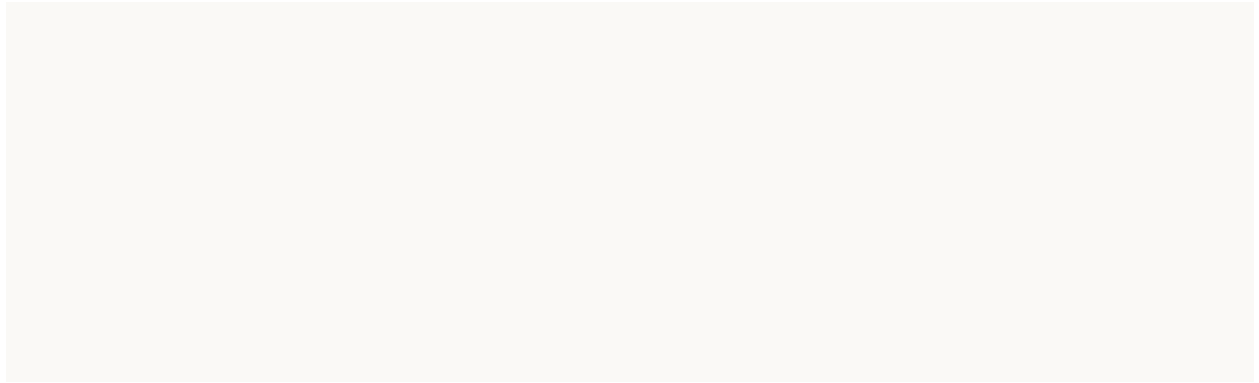
1. Identify all the benefits your product offers.



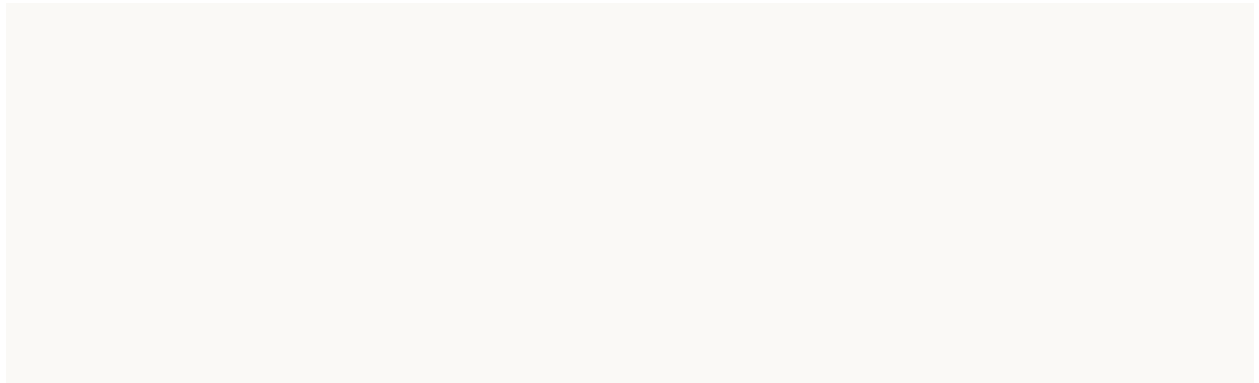
2. Describe what makes these benefits valuable.



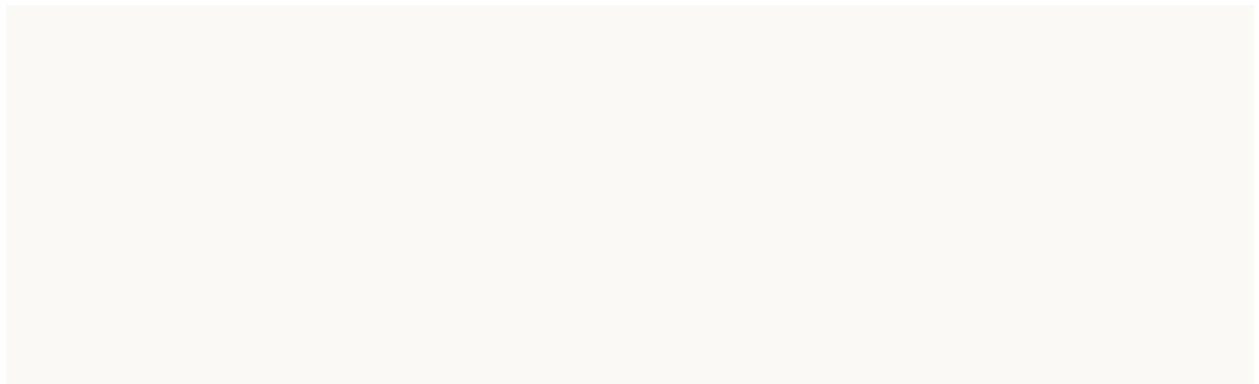
3. Identify your customer's main problem.



4. Connect this value to your buyer's problem.



5. Differentiate yourself as the preferred provider of this value.



# 6 Steps to *establish* your POSITION

01 DETERMINE HOW YOUR BRAND IS CURRENTLY POSITIONING ITSELF

*02 Identify your direct competitors*

03 UNDERSTAND HOW EACH COMPETITOR IS POSITIONING THEIR BRAND

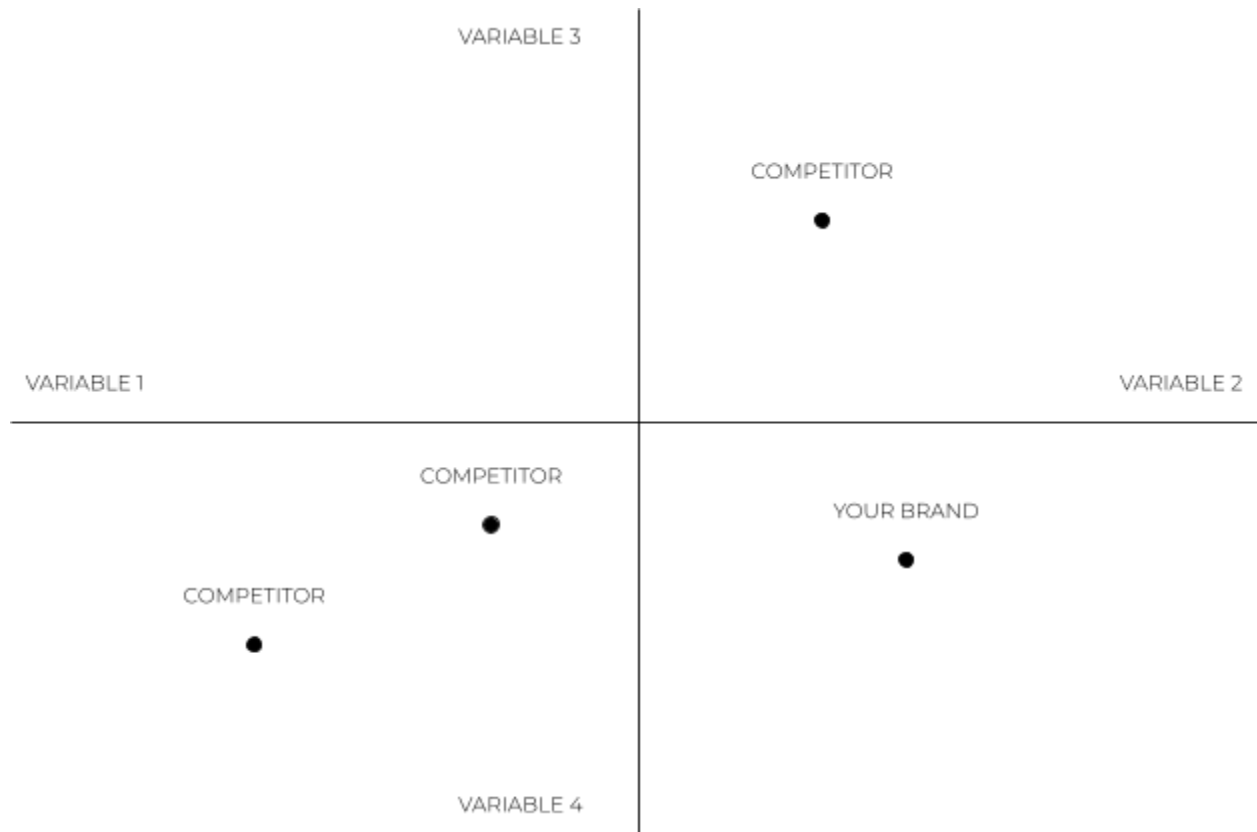
*04 Compare your positioning to your competitors to identify your uniqueness*

05 DEVELOP A DISTINCT AND VALUE-BASED POSITIONING IDEA

*06 Craft a brand positioning statement*

# Brand Mapping

Use the map to show where your brand falls



## DEVELOP YOUR POSITIONING STATEMENT

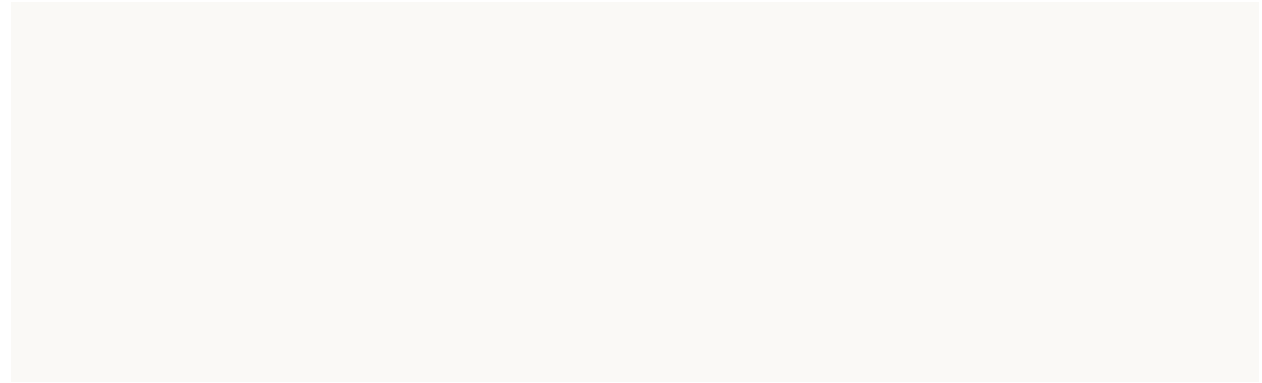
A positioning statement is typically three to five sentences in length and captures the essence of your brand positioning.

*Use these questions to help guide your brand positioning statement.*

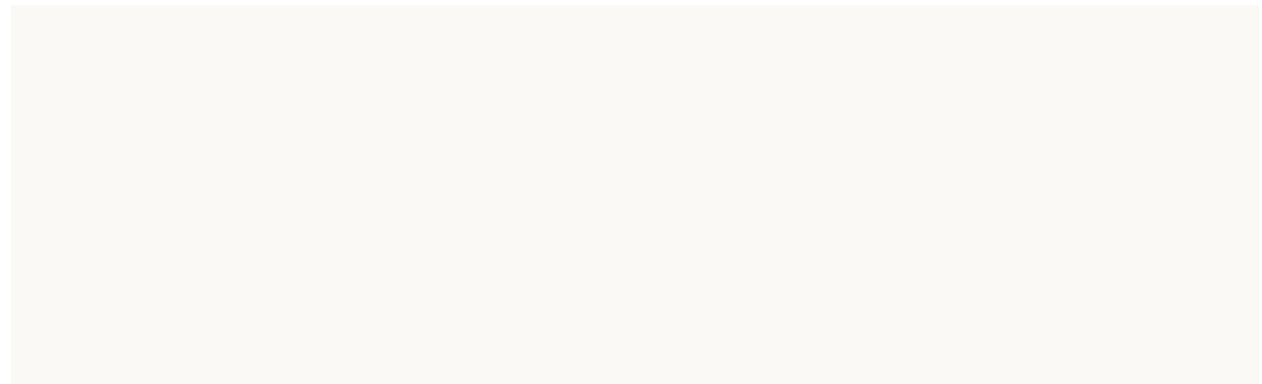
What's your perspective (or truth) as it relates to your industry?

What fired you up or made you passionate enough to get started?

What's unique, different, or innovative about your approach/POV?

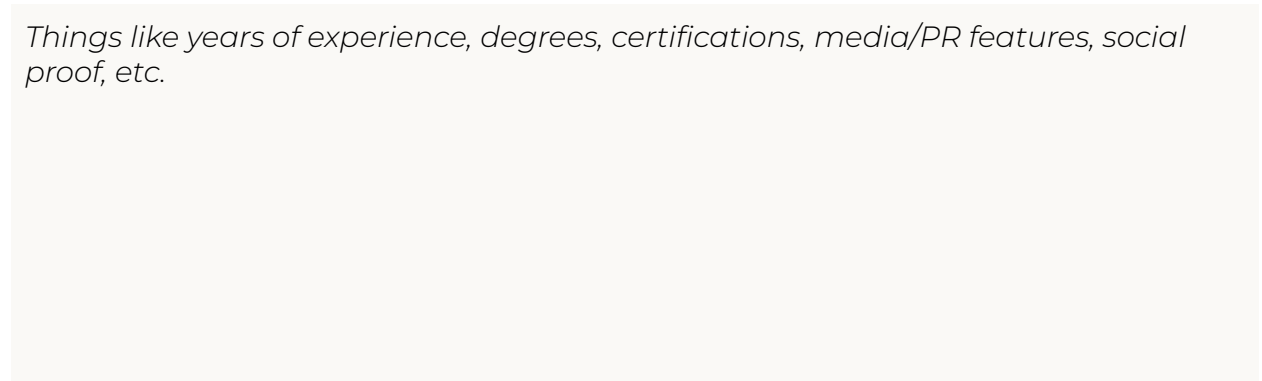


What are your primary differentiators?



What are your logical strengths?

*Things like years of experience, degrees, certifications, media/PR features, social proof, etc.*





What are your emotional strengths?

*Could be related to your personal story as the founder, could be related to your aligned brands or brand partners, could be related to your brand's visual elements/branding*

Who are your top 3 competitors you're working to stand in contrast to?

Who would be 3 aligned brands?

# Brand *positioning* TEMPLATES

I help [target audience] go from [the problem they are struggling with] to [the solution or transformation] with/through [what you do].

For [target audience], [brand] is the [what you do/your plan to help] that delivers [what makes you different] so they can [end result or solution], because [why you do what you do or what their life/business will look like].

At [business name] we [what you do] for [who you do it for] because we believe that [what is the value].

At [business name] we [what you do] for [who you do it for], [how we do it differently].

# 18 ways to *differentiate* your brand

1. PRICE DIFFERENTLY
2. START A NICHE
3. BE THE EXPERT
4. DELIVER A UNIQUE EXPERIENCE
5. DISTINCTIVE BRAND COLLATERAL
6. BE INNOVATIVE
7. CREATE A NEW PRODUCT
8. MAKE IT CONVENIENT
9. CONSISTENTLY OVER-DELIVER
10. TELL YOUR UNIQUE BRAND STORY
11. SOLVE A UNIVERSAL PROBLEM
12. APPEAL TO EMOTIONS
13. MAKE IT PERSONAL
14. GIVE BACK
15. SIMPLIFY YOUR CUSTOMERS' LIVES
16. PROVIDE HIGHER QUALITY
17. LIMIT AVAILABILITY
18. SERVE AN UNMET NEED

# 15 criteria for checking your brand *positioning*

1. DOES IT DIFFERENTIATE YOUR BRAND?

2. DOES IT MATCH CUSTOMER PERCEPTIONS OF YOUR BRAND?

3. DOES IT ENABLE GROWTH?

4. DOES IT IDENTIFY YOUR BRAND'S UNIQUE VALUE TO YOUR CUSTOMERS?

5. DOES IT PRODUCE A CLEAR PICTURE IN YOUR MIND THAT'S DIFFERENT FROM YOUR COMPETITORS?

6. IS IT FOCUSED ON YOUR CORE CUSTOMERS?

7. IS IT MEMORABLE AND MOTIVATING?

8. IS IT CONSISTENT IN ALL AREAS OF YOUR BUSINESS?

9. IS IT EASY TO UNDERSTAND?

10. IS IT DIFFICULT TO COPY?

11. IS IT POSITIONED FOR LONG-TERM SUCCESS?

12. IS YOUR BRAND PROMISE BELIEVABLE AND CREDIBLE?

13. CAN YOUR BRAND OWN IT?

14. WILL IT WITHSTAND COUNTERATTACKS FROM YOUR COMPETITORS?

15. WILL IT HELP YOU MAKE MORE EFFECTIVE MARKETING AND BRANDING DECISIONS?

## LESSON THREE

# Finding *your* NICHE

Defining your brand niche is a crucial step in building a strong brand identity. Your niche helps you target the right audience and stand out in a crowded market. People want specialists. What's your zone of genius? Narrow your niche and find your focus with these exercises

### *Step one* CONSIDER YOUR IDEAL CLIENT

Think about your ideal client. Consider demographics (age, gender, location), psychographics (interests, values, challenges), and any other relevant characteristics.

---

### *Step two* IDENTIFYING YOUR EXPERTISE

List your areas of expertise, skills, and knowledge. What do you excel at, and what makes you unique in your industry?

---

### *Step three* FINDING THE OVERLAP

Identify where your expertise and your ideal client's needs overlap. What specific problems or needs can you address with your expertise?

## *Step four* FILL THE GAPS

Think about your competitors in your industry or niche. What gaps or opportunities do you see that your brand can fill?

---

## *Step five* REFINING YOUR NICHE

Based on your research and analysis, refine your brand niche statement. Define who your brand serves and what unique value you offer.

*module four*

# Your People

SHIFT THE FOCUS FROM YOUR  
BRAND TO YOUR AUDIENCE'S NEEDS

## LESSON ONE

# Understanding *your* AUDIENCE

### AUDIENCE DEMOGRAPHICS

Fill this out for 2-3 different people that would be in your target audience. These can be real people you talk to or personas that you create based on your market research.

NAME	AGE
LOCATION	OCCUPATION
INCOME BRACKET	MARITAL STATUS
DO THEY HAVE CHILDREN?	LEVEL OF EDUCATION
WHAT DO THEY LIKE TO DO IN THEIR FREE TIME?	WHAT'S THEIR STYLE LIKE?
WHERE DO THEY SHOP?	WHAT KIND OF BOOKS, TV SHOWS, AND MOVIES DO THEY ENJOY?
WHAT IS THEIR RELATIONSHIP WITH SOCIAL MEDIA?	WHERE DO THEY SPEND THEIR TIME ONLINE?
ARE THEY AN IMPULSE BUYER OR PLANNER?	WHAT WEBSITES DO THEY LIKE TO VISIT?
WHAT OTHER BRANDS DO THEY USE OR APPRECIATE?	HOW DO THEY DISCOVER NEW BRANDS?



NAME	AGE
LOCATION	OCCUPATION
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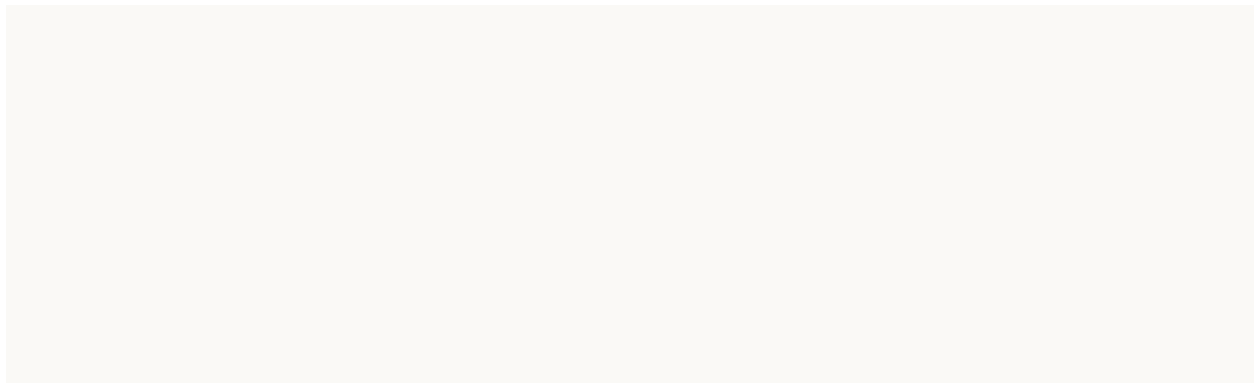
## AUDIENCE PSYCHOGRAPHICS

### *Primary Wants and Needs*

What are their primary wants, needs, and desires?

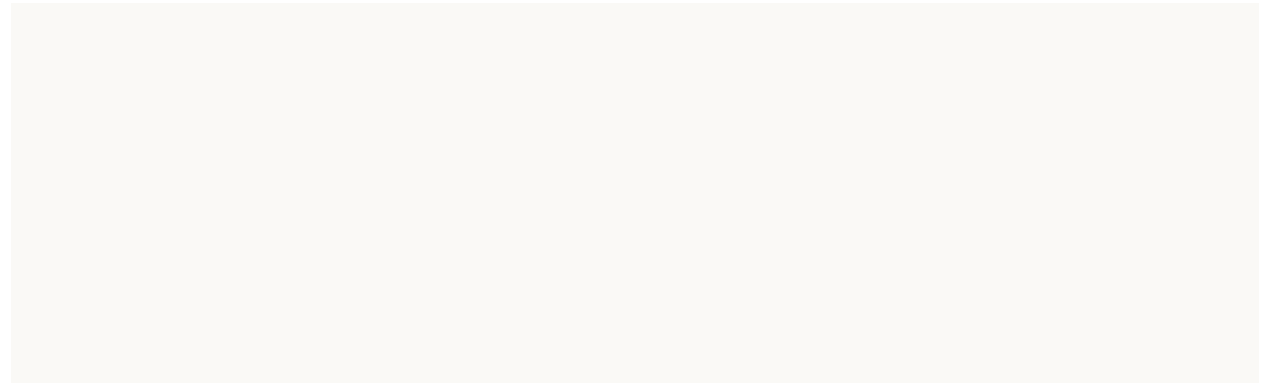


What problems or challenges do they face?

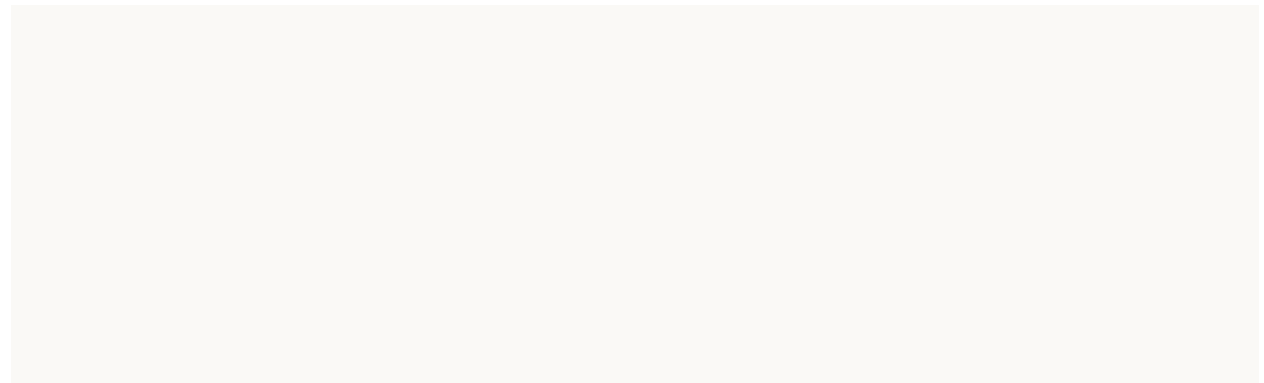


## *Desired Lifestyle and Aspirations*

What are their hopes and dreams for the future?

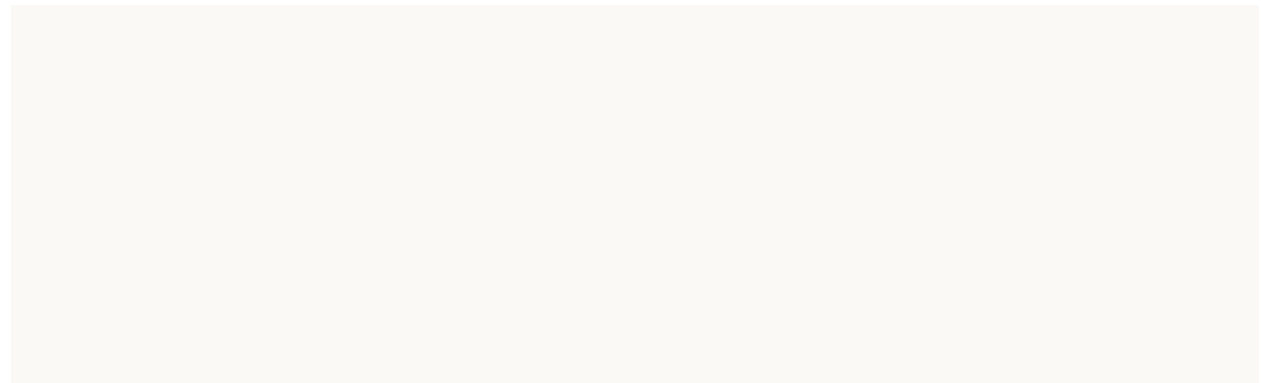


What does their ideal life/business look like?

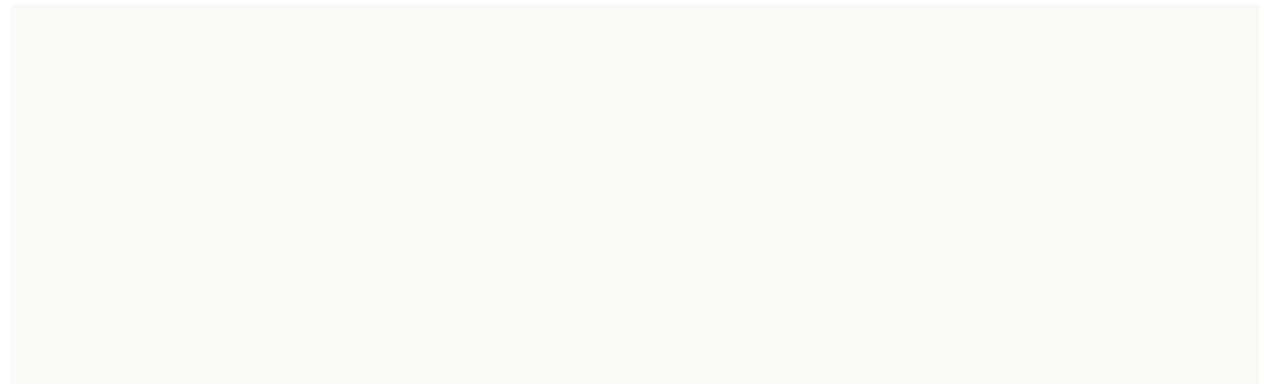


## *Values and Emotions*

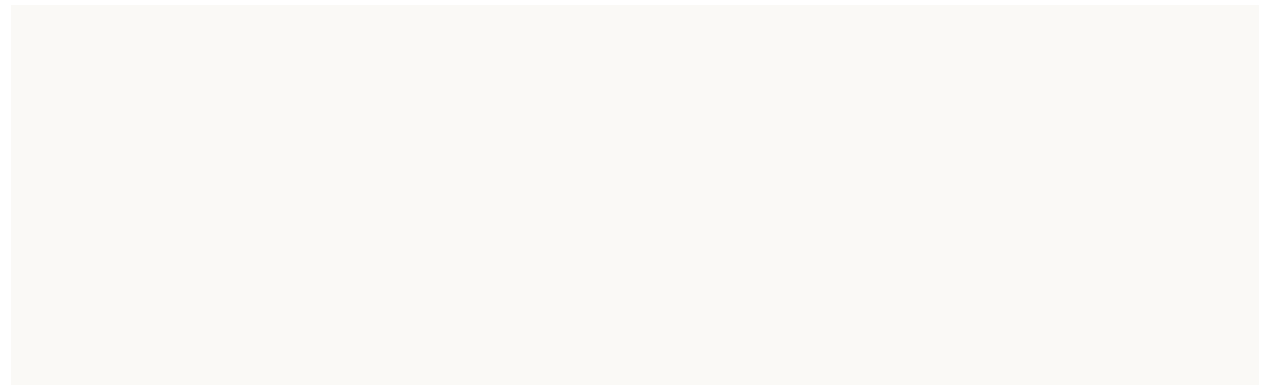
What things do they value?



What emotions are running through them?

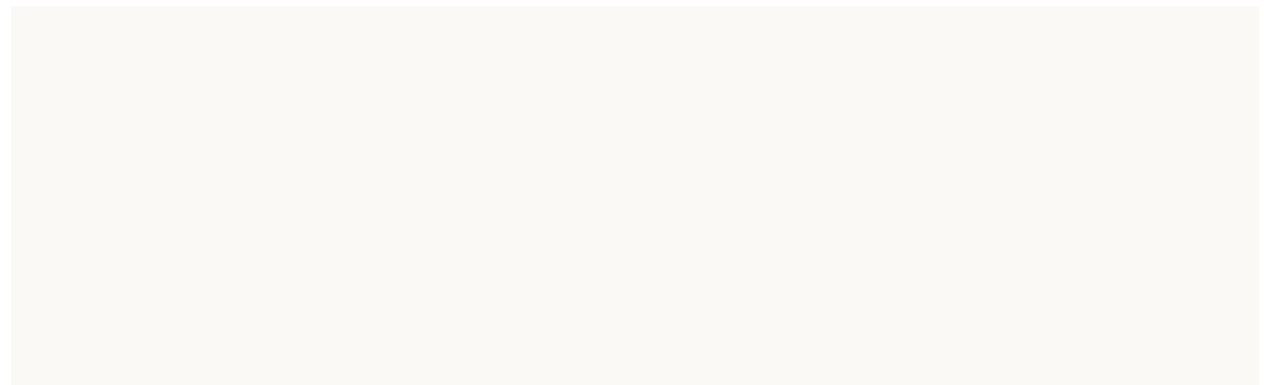


What are their fears, worries, and daily stresses?



### *Current Satisfaction and Change*

Are they happy with where they are in life? If not, what would they change?



What does their ideal life look like?

What's NOT important to them?

*Desired Outcomes and Motivations*

What are their desired results?

What are their key motivational triggers?

### *Objections and Misconceptions*

What are the 3 biggest objections they will have to what you offer (e.g., time, money, etc.)?

What are the 3 truths about why what you offer is more powerful and overcomes those objections?

What misconceptions do they have about your offering or industry?

### *Challenges*

What are the top 3 traits that automatically identify someone as an ideal person for the work you do?

What are the 3 biggest challenges your ideal audience faces in achieving their desired results?



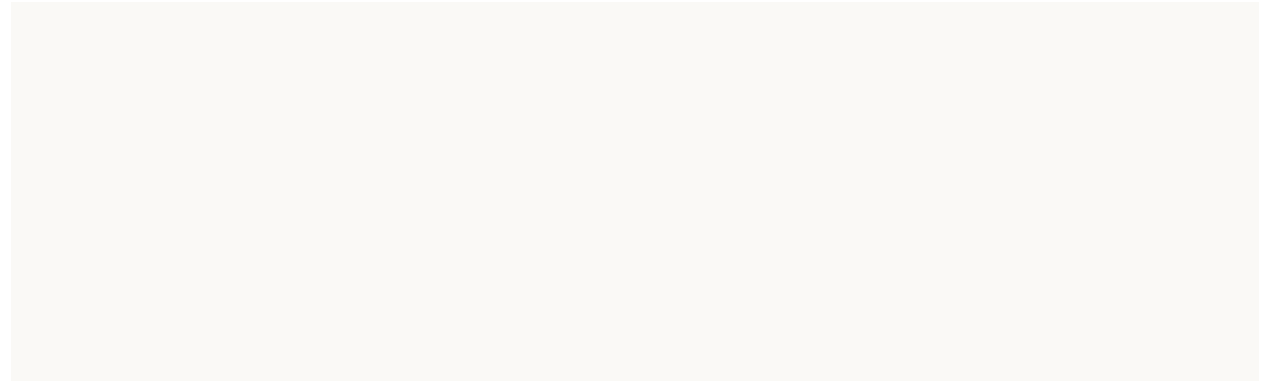
What are the top 3 results your ideal audience wants to achieve?

### *Competing Services and Messaging*

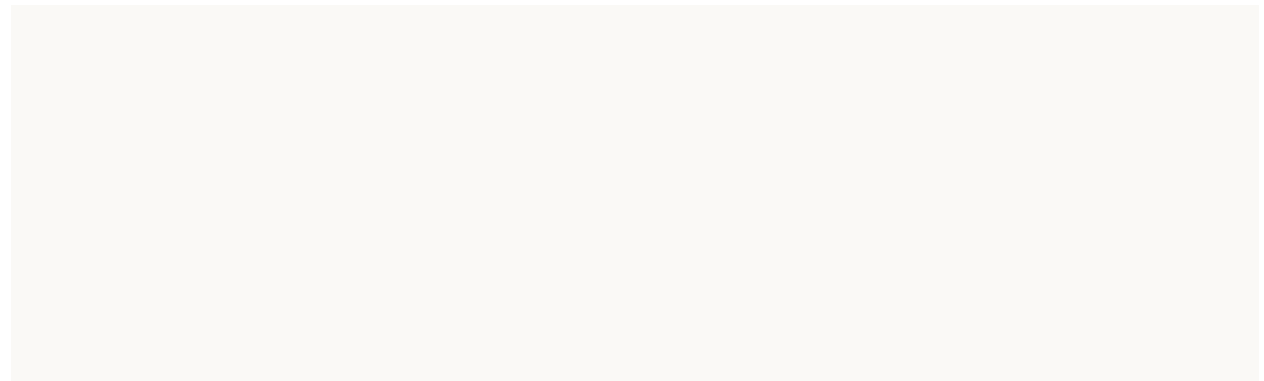
What is currently being sold to your audience to alleviate these struggles, that you do not agree with?

What messages do you believe the above services/products are putting out into the world?

Why do you believe these services/products are more harmful than helpful in keeping your ideal audience further from the result they want?

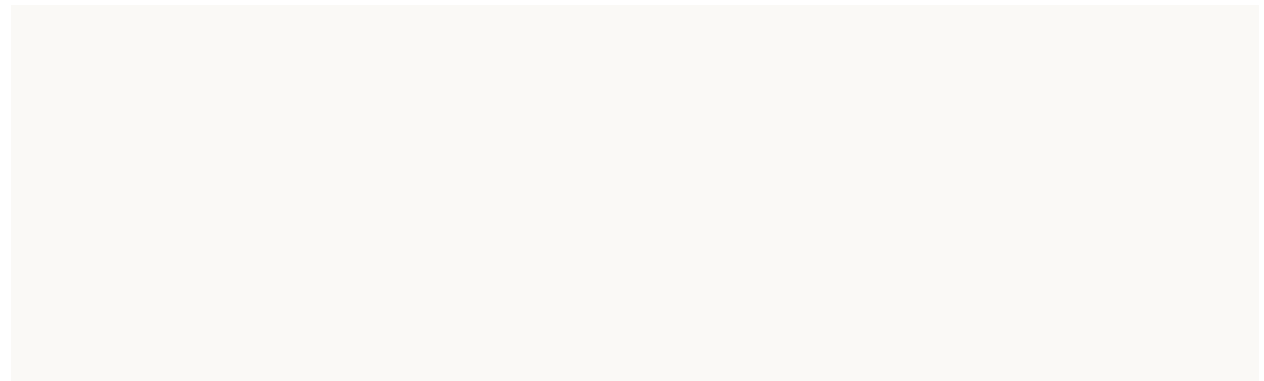


What message needs to get out there instead? What do you believe will actually bring long-term results in this area of their life?



### *Buying Decisions*

What drives your target audience to make buying decisions?



## AUDIENCE PROFILE

Write out your audience profile in story format for those 3 different people you answered the questions about.

### EXAMPLE:

In the heart of Austin, Texas, lives a creative soul named Emily Turner. At 32 years old, she's the imaginative force behind Ink & Bloom Studio, an online stationery and design shop that captures the essence of beauty and sustainability. With a bachelor's degree in Graphic Design and a heart deeply connected to authentic creativity, Emily is on a mission to make the world a more beautiful and eco-friendly place.

Emily's story is one of passion, purpose, and a touch of entrepreneurial flair. As the owner of Ink & Bloom Studio, she curates custom invitations, greeting cards, and downloadable printables that reflect her commitment to both creativity and sustainability. Her products are more than just beautiful designs – they're a piece of her soul, an embodiment of her values.

However, as Emily carefully crafts her designs, she faces a familiar challenge that many creative entrepreneurs encounter. Balancing the artistic aspect of her work with the demands of running a business often leaves her with limited time for marketing efforts. As her business grows, so do the responsibilities, and Emily finds herself seeking a way to make her brand shine even brighter in the vast online landscape.

In her quest to connect, engage, and sell, Emily scours Instagram feeds

and Pinterest boards for inspiration. She actively participates in Facebook groups for female entrepreneurs in the creative space, seeking advice and camaraderie. She subscribes to newsletters that offer valuable insights into scaling her business sustainably, eagerly consuming tips that resonate with her journey.

But there's one area where Emily yearns for a bit of assistance: the art of words. Crafting engaging content, witty captions, and persuasive product descriptions to reflect her brand's values isn't her forte. She understands the power of words but finds herself occasionally struggling to bring them to life.

Enter you, the copywriter who's poised to make a meaningful impact on Emily's journey. You understand her challenges, having seen countless creative business owners grapple with the same conundrum. You know that Emily's journey is unique, her commitment to sustainability forming a cornerstone of her brand.

Your approach is personalized and thoughtful. You emphasize the significance of storytelling in conveying the heart behind her creations. With your guidance, Emily learns how to seamlessly weave her values into every aspect of her business, connecting deeply with her audience.

Your services offer a tailored solution to her content creation woes. Your words not only captivate but educate, shining a spotlight on the sustainable practices she holds dear. As Emily watches her online presence blossom, her engagement soar, and her sales climb, she realizes the undeniable impact that strategic and soulful copy can have on a

brand.

Your collaboration goes beyond transactions; it's a partnership built on shared values and a mutual dedication to creative expression. Through your work, Emily's brand transforms, resonating with customers who value authenticity and sustainability.

In the bustling world of online businesses, Emily's story and journey are uniquely hers. And as her business continues to bloom, you, the copywriter who saw the potential in her brand, play an essential role in making her dreams a reality.



## LESSON TWO

# Mapping the CUSTOMER *journey*

A customer journey map is a visual representation of the process a customer or prospect goes through to achieve a goal with your company. With the help of a customer journey map, you can get a sense of your customers' motivations -- their needs and pain points.

Use the template on the following page to map out your customer journey. The information on the left about your customer will probably stay the same unless there is something specific you know about your customer at a certain point in their journey. You can use the text on the right side as guidance to determine what specific actions you'll take to meet the customer at each stage of the journey.

YOUR CUSTOMER		YOUR ACTIONS
Becomes aware of pain points	<i>Awareness</i>	Focus on problems and pain points, use big picture content like social media and PR
Gets interest in finding a solution and starts to seek out options	<i>Interest</i>	Focus on solutions, educate, help potential clients evaluate their options with ebooks, videos, guides, etc.
Begins to trust that you know what you're talking about and might have the solution to their problem	<i>Trust</i>	Provide free value showing your expertise and giving them small wins
Evaluates specific products and services to find the best solution	<i>Consideration</i>	Show what it's like to work with you using testimonials, trials, case studies, and webinars
Commits to a specific solution and justifies their purchase	<i>Purchase</i>	Validate their decisions by making the process easy, using trainings, guides, and events
Expects a good experience and may become willing to share with others	<i>Experience</i>	Make their experience a memorable one that they will want to share with a seamless, branded process



## LESSON THREE

# Crafting OFFERINGS that *resonate*

### OFFERING BRAINSTORM

What offering (service or product) could you provide to help your audience? For example, if you have a ton of useful blog content, could you create a course on a particular topic?

How will your offering benefit your audience? What outcome will they achieve? What differentiates your offering from what your competitors are selling? Your experience? Your unique personality?

# *Offer idea bank*

EBOOK / PDF GUIDE

WORKSHOP

TEMPLATE

WORKBOOK

MINI-COURSE

MASTERCLASS

CHALLENGE

EMAIL COURSE

BOOTCAMP

COACHING

CONSULTING

MEMBERSHIP

MASTERMIND

RETREAT

SUPPORT

ACCOUNTABILITY GROUP

1:1 SERVICES

PLANNER

EVENT

SUMMIT

SWIPE FILES

VIDEO SERIES

CHECKLIST

CALENDAR

TOOLKIT

TUTORIALS

SOFTWARE

BOOKS

SPEAKING

STOCK PHOTOS

PHYSICAL MERCHANDISE

DEVELOP YOUR OFFERING SUITE

	<p><i>Free offer</i></p> <p>The purpose of the free offer is to generate sales leads. Once you've identified your ideal client's problems, you'll demonstrate your expertise (you're the one to solve it) by helping them solve their problem (a little bit) with a free offer. Examples: Blog posts, a free e-book, how-to videos, audio exercises, a free introductory course, a webinar</p>
	<p><i>Intro offer</i></p> <p>An intro offer is a low-priced offering that solves the problem a little bit more than your free offering. Examples: eBook, paid workshop/webinar, an email challenge, a mini-course</p>
	<p><i>Lead offer</i></p> <p>Your lead offer costs a little bit more but it includes a much greater value. Here, you can begin offering 1-1 services that require your time, or, if you're selling digital products, it will be a higher-priced offering than your tripwire but still less than your high-ticket offerings. Examples: Road-mapping session, a done-for-you playbook or strategy, an introductory course, 1-1 coaching/consulting to achieve a specific result</p>

### *Signature offer*

A signature offer (or a “core offer”) is where you pull out all the stops and do whatever you need to do to solve your customer’s biggest problem. Examples: This is a high-priced offer—either a more comprehensive course or done-for-you 1-1 services.

OFFERING EXPLORATION

Fill this out for each of your offers to further explore the alignment with your brand.  
Copy and paste for other offers.

OFFER NAME	
OFFER DESCRIPTION	
KEY BENEFIT	
UNIQUE VALUE	

*module five*

# Your Personality

HUMANIZE YOUR BRAND THROUGH A  
WELL-DEFINED VOICE + PERSONALITY

LESSON ONE

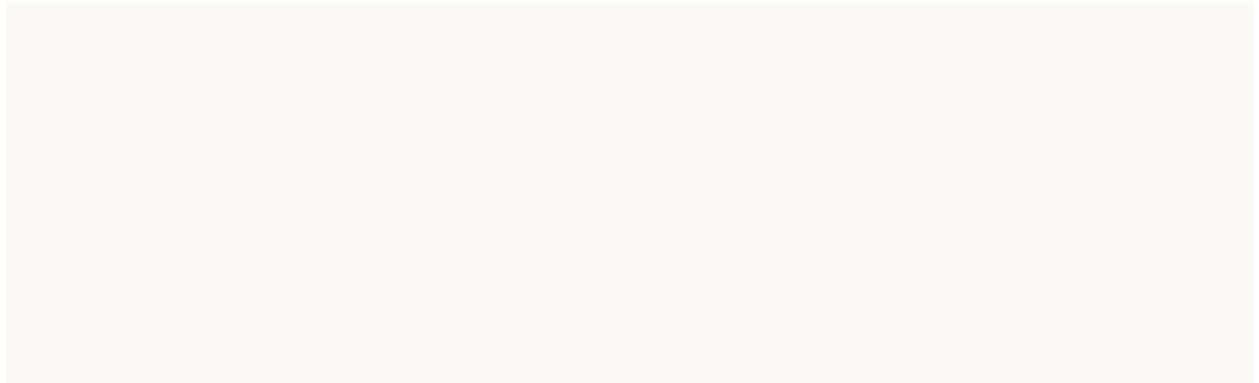
# Defining your BRAND *voice*

*Answer these prompts to help clarify what your brand's voice sounds like (and what it doesn't).*

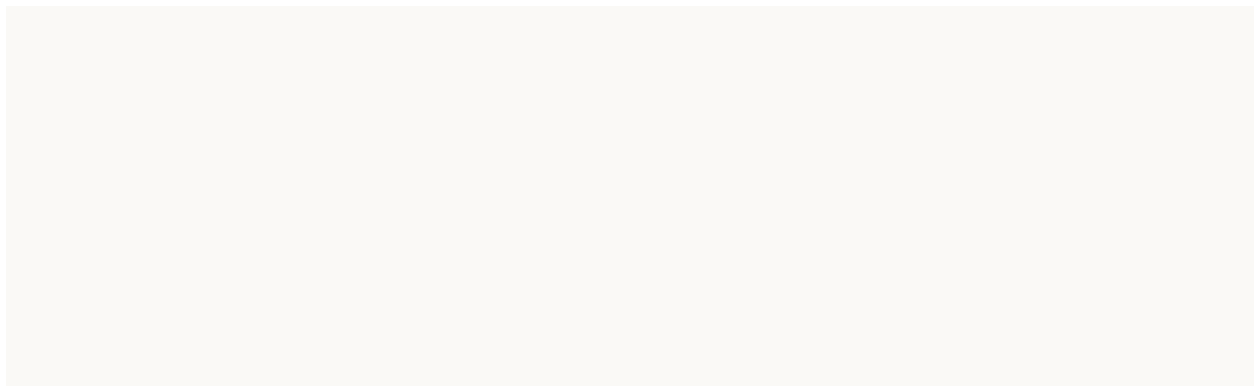
When customers interact with your brand, how do you want them to feel?

What three adjectives would you use to describe your brand's tone? (*refer to the brand adjectives bank below*)

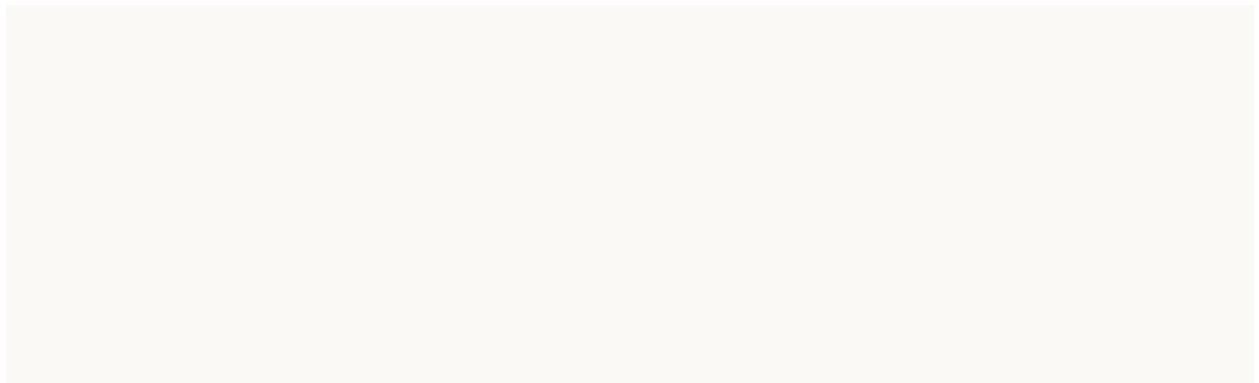
What phrases do you tend to use often, taking note of specific spelling, word choices, and punctuation?



What are some key industry buzzwords or jargon you avoid in your messaging?



What do you NOT want to be or sound like?



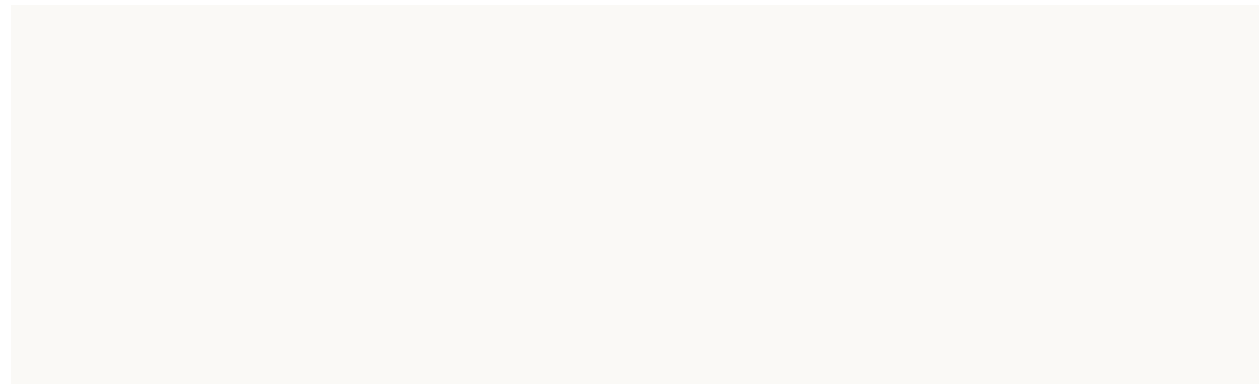


What type of humor (if any) does your brand use in communication?

Describe the pace at which your brand's messaging is delivered (fast, steady, relaxed, urgent).

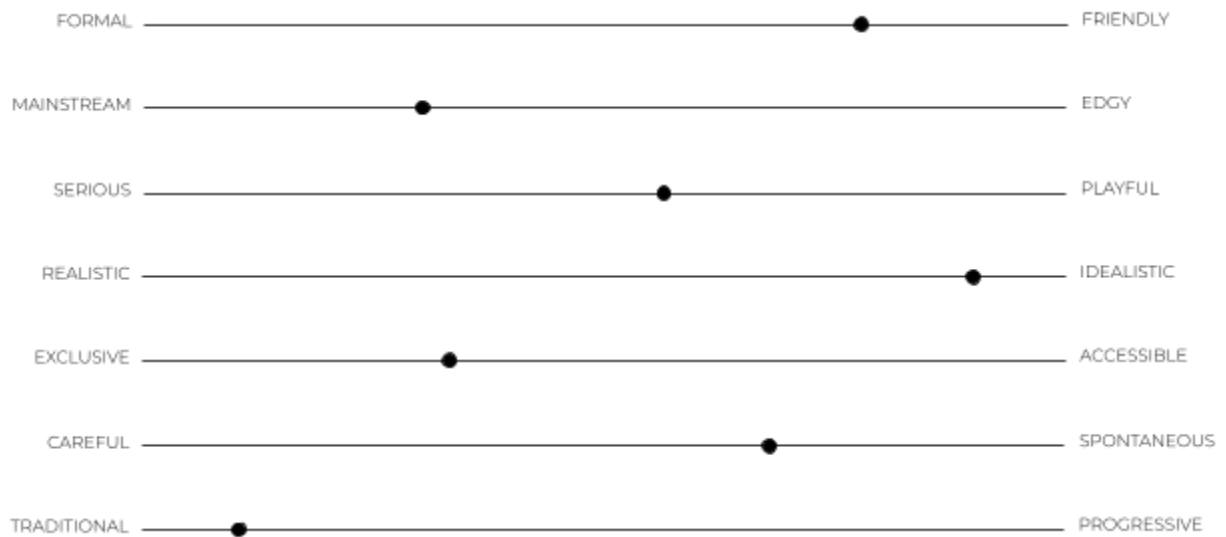
How does your brand adapt its voice for different communication channels (e.g., social media, website, email)?

What does your competition sound like? How can you differentiate yourself from them?



## TONE OF VOICE SCALE

Double click to open the scale and move the circles to where your brand falls for each tone of voice variable.



LESSON TWO

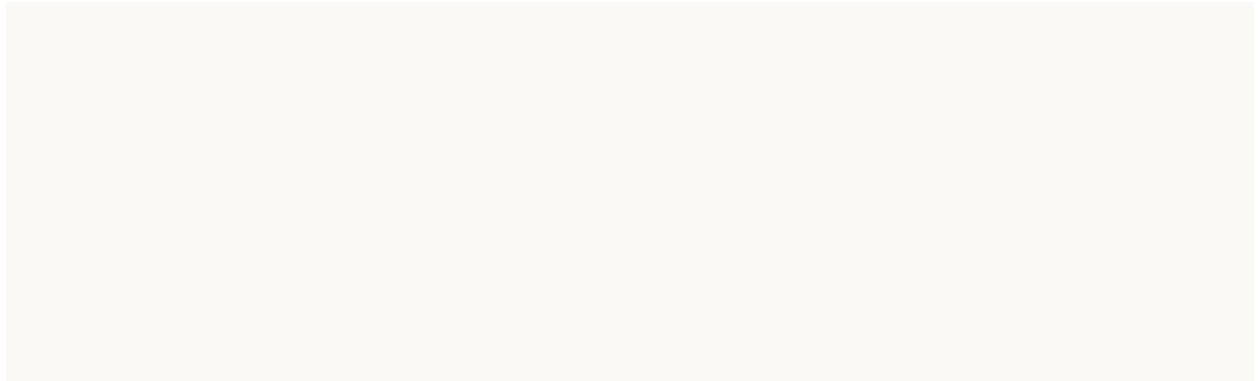
# Building your *brand* PERSONALITY

Describe your brand's personality in three words.

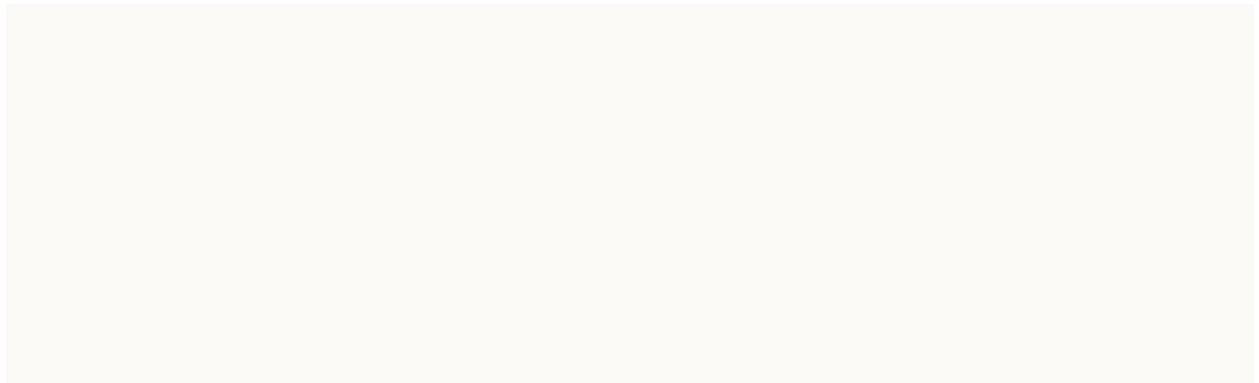
Review your content, photos, and videos and ask yourself: do these 3-5 personality adjectives come through loud and clear?

What emotions do you want your brand's messaging to evoke in your audience?

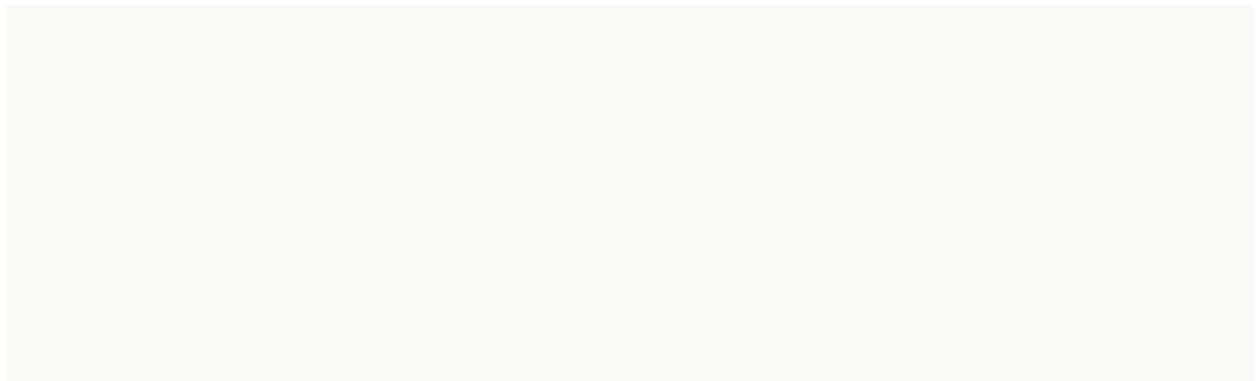
Imagine your brand were a person — how would you describe their personality? How would they introduce themselves at a party?



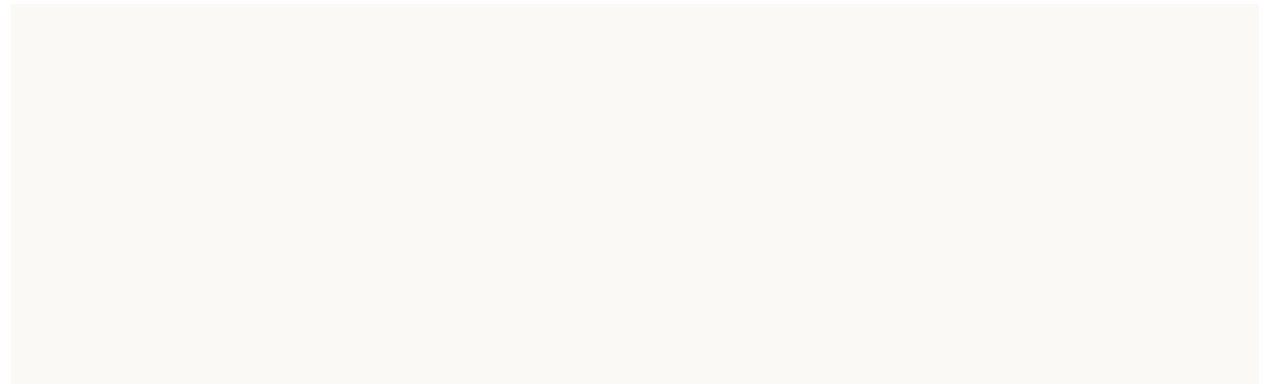
If your brand were an outfit, what would it be? Get as detailed as possible.



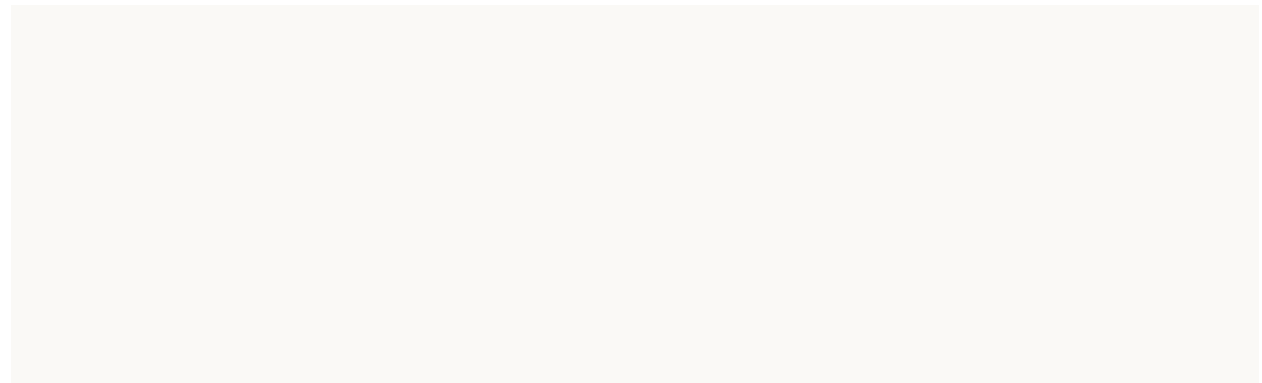
If your brand were a cocktail, what would it be and why?



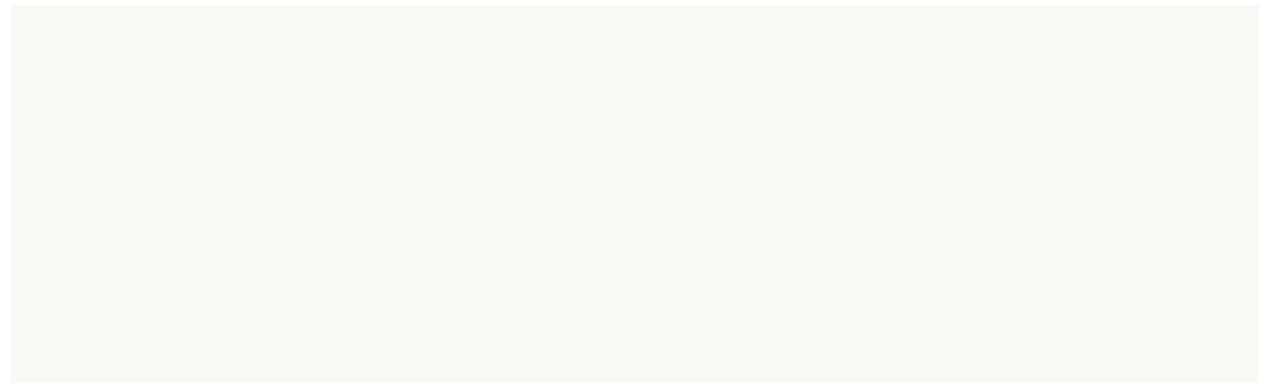
If your brand were a vacation destination, where would it be?



What quote, motto or mantra best represents your brand?



If you had to describe your brand as a contradiction, what would it be? (I.e. Pretty with an edge, Industrial Romance, Modern meets rustic)

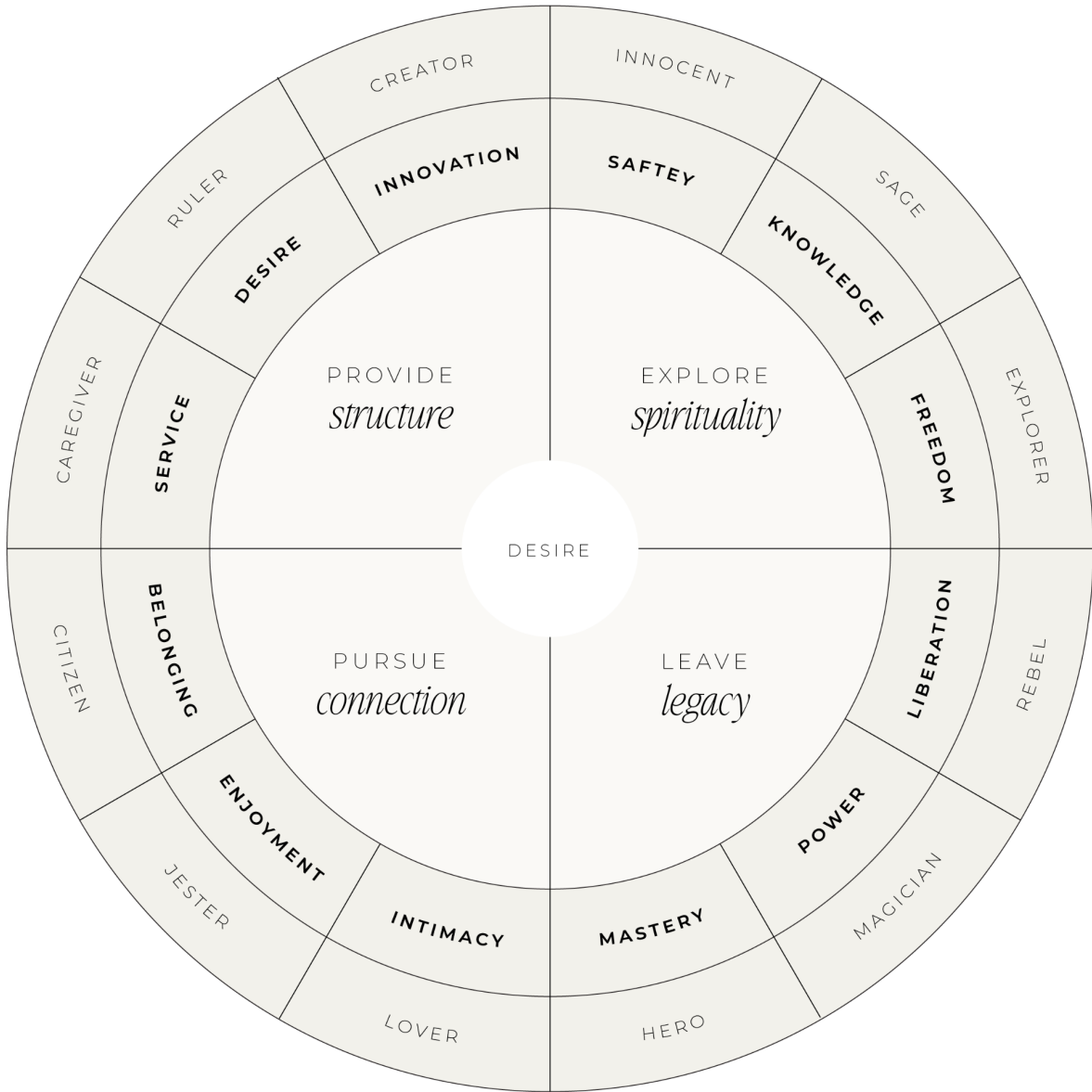


# BRAND PERSONALITY SCALE

Double click to open the scale and move the circles to where your brand falls for each brand personality variable.



# Brand ARCHETYPES



# *The* LOVER

BRAND VOICE	DRIVEN BY	FEARS
<i>Sensual</i> <i>Empathetic</i> <i>Soothing</i>	<i>Sensuality</i> <i>Closeness</i> <i>Indulgence</i> <i>Affection</i> <i>Love</i>	<i>Rejection</i> <i>Loneliness</i> <i>Isolation</i> <i>Invisibility</i> <i>Contempt</i>

## Brand PERSONALITY

The lover desires to be desired. The experience of Intimacy, closeness and sensual pleasure are what the lover seeks and will use the means they have to achieve it. They are motivated to become more physically and emotionally appealing to increase their capacity to attract others.

They fear being unnoticed, unloved and unwanted and because their passionate desires cloud their judgement, they can easily be misled. Even when Lovers achieve all their desires, they are still fearful of loss.

## Brand STRATEGY

To appeal to a Lover you need to make them feel attractive or stir their passionate desires for connection and intimacy. Because of their attraction to sensory pleasure, communication and messaging should use sensual language and tone. Imagery and tone of voice are especially important for The Lover archetype.

Brands appealing to Lover personalities can leverage their audience's desire for sensual pleasure through sight, sound, smell, or touch. The color red is especially appealing to The Lover.



# *The* HERO

BRAND VOICE	DRIVEN BY	FEARS
<i>Honest</i> <i>Candid</i> <i>Brave</i>	<i>Mastery</i> <i>Courageousness</i> <i>Growth</i> <i>Development</i>	<i>Incompetence</i> <i>Cowardice</i> <i>Deterioration</i> <i>Downfall</i> <i>Incapability</i>

## Brand PERSONALITY

The Hero's main motivation is to prove their worth through courage and determination. They work hard in order to have the skills they deem required and take pride that their work rate sets them apart from the rest.

They need to meet challenges head-on and carry defeats or failures until they are corrected. The Hero wants to save the day to prove their worth to themselves but also so the world knows of their ability.

## Brand STRATEGY

To appeal to a hero you should inspire them and make them feel empowered to succeed and achieve. They see themselves as upstanding citizens and the bully's nemesis and they stand up for what's right.

Heros want to rise to their ambitions and brands that can acknowledge those ambitions and encourage the challenge will connect with them. A Hero wants to be inspired by the possibility to achieve and the gratification that comes with it.

# *The* MAGICIAN

BRAND VOICE	DRIVEN BY	FEARS
<i>Mystical</i> <i>Informed</i> <i>Reassuring</i>	<i>Transformation</i> <i>Knowledge</i> <i>Vision</i> <i>Belief</i> <i>Discovery</i>	<i>Consequences</i> <i>Stagnation</i> <i>Ignorance</i> <i>Doubt</i> <i>Uncertainty</i>

## Brand PERSONALITY

The Magician strives to make dreams come true through somewhat mystical ways. They have the ability to take people on a journey of transformation through the experience of a magical moment. They believe that we are limited only by imagination and defy the common belief of the laws of reality to lead us to a better future. Magicians have a thirst for knowledge though they don't willingly share it, rather they use it to show their vision.

## Brand STRATEGY

The Magician archetype rarely fits a buyer persona but appeals to different personas with their ability to transform. Brands that provide a product or service that take their customers on a transformational journey (Lost to found, Insecurity to security, Worn out to refreshed), could well consider the Magician Archetype as the personality to connect with their audience.

# *The* REBEL

BRAND VOICE	DRIVEN BY	FEARS
<i>Disruptive</i> <i>Rebellious</i> <i>Combative</i>	<i>Liberation</i> <i>Change</i> <i>Righteousness</i> <i>Revenge</i> <i>Independence</i>	<i>Servitude</i> <i>Conformity</i> <i>Complacency</i> <i>Acceptance</i> <i>Dependence</i>

## Brand PERSONALITY

The Rebel has a desire for revolution partly to change the world for the better and partly for the anarchy involved. They have a disdain for rules, regulation, and conformity that would remove any form of their freedom of choice (or anyone else's). They are good at the core but anger is part of their motivation, which can become the dominant force. Without a fight, they are lost.

## Brand STRATEGY

To appeal to a rebel you need to prove to them first that you see the world as they do. Status Quo and Conformity are the common enemy and showing disdain for either will go a long way to resonating. Encouraging, facilitating, or empowering revolution on the other hand, will make you an instant family (or gang) member. Formal communication should be avoided and your language and tone should be laced with grit and attitude.

# *The* JESTER

BRAND VOICE	DRIVEN BY	FEARS
<i>Fun loving</i> <i>Playful</i> <i>Optimistic</i>	<i>Fun</i> <i>Happiness</i> <i>Laughter</i> <i>Togetherness</i> <i>Positivity</i>	<i>Boredom</i> <i>Gloom</i> <i>Sadness</i> <i>Loneliness</i> <i>Negativity</i>

## Brand PERSONALITY

The Jester is all about having fun and living life in the moment. They not only love having fun themselves, they see it as their duty to be a ray of sunshine in everyone's life around them.

They are optimists and can't be kept down long due to their ability to see the good in every situation. Jesters are young at heart and continue their child-like nature long after their friends have grown up and become serious.

## Brand STRATEGY

Jesters are rarely a buyer persona but can be a perfect archetype for brands in the business of entertaining or wanting to associate themselves with good times. Regardless of archetype and personality, everyone likes to laugh, and provided the context and the timing is right, the Jester personality can be a memorable and loving point of differentiation.

As the Jester Archetype your brand should highlight the light-hearted and positive side of life with a playful and entertaining spirit. Brands that are able to connect with their audience through happiness and laughter can become much-loved brands.

# *The* CAREGIVER

BRAND VOICE	DRIVEN BY	FEARS
<i>Caring</i> <i>Warm</i> <i>Reassuring</i>	<i>Support</i> <i>Help</i> <i>Service</i> <i>Recognition</i> <i>Gratitude</i>	<i>Anguish</i> <i>Helplessness</i> <i>Neglect</i> <i>Blame</i>

## Brand PERSONALITY

The Caregiver is a selfless personality who is driven by the desire to protect and care for others, especially those in need. They are often maternity figures and take those who are in need of care, under their wing until they are stronger to take care of themselves.

Caregivers are not just reactive, they are also preventative and tend to be in and around an event of harm, before or after.

## Brand STRATEGY

The Caregiver archetype is a perfect fit for brands that help those in need. The people such brands help are often vulnerable and sensitive and require a soft touch. Warm, thoughtful, generous and motherly approach offers a feeling of safety that will appeal to their needs.

A Caregiver brand's aim is to make their customers feel secure, protected, and cared for. Caregiver brands may need to appeal to wider audiences as they often require external input in order provide care for those in need.

# *The* RULER

BRAND VOICE	DRIVEN BY	FEARS
<i>Commanding</i> <i>Refined</i> <i>Articulate</i>	<i>Power</i> <i>Prosperity</i> <i>Status</i> <i>Success</i> <i>Wealth</i>	<i>Weakness</i> <i>Insignificance</i> <i>Failure</i> <i>Poverty</i> <i>Destitution</i>

## Brand PERSONALITY

The Ruler desires control above all else and is a dominant personality. They are authoritative in their communication and in their actions and carry a sense of intimidation. Their goal is for prosperity and success and for that prosperity to trickle down to those who are loyal to his rule. They are confident, responsible, and in control of their lives and expect the same from others. Rulers see themselves at the top of the food chain and aggressively defend that position.

## Brand STRATEGY

To appeal to a Ruler you must re-affirm their sense of power, control, and respect. Rulers want to feel a sense of superiority. That they are part of an exclusive V.I.P. club. Appealing to the masses will not get the Rulers attention and would more likely turn them off. Ruler brands must provide their customers with a sense of reaffirmation that they are at the top of the ladder of success and are part of an exclusive club.

# *The* CREATOR

BRAND VOICE	DRIVEN BY	FEARS
<i>Inspirational</i> <i>Daring</i> <i>Provocative</i>	<i>Creation</i> <i>Originality</i> <i>Self-Expression</i> <i>Vision</i> <i>Imagination</i>	<i>Stagnation</i> <i>Duplication</i> <i>Familiarity</i> <i>Disillusion</i> <i>Indifference</i>

## Brand PERSONALITY

The Creator has a desire to create something new and exceptional, that wasn't previously there and has enduring value. They need to express themselves with their individual talent and strive to bring their vision to life through that expression. Creators believe that if you imagine it, it can be created but are often stifled by their own desire for perfection.

## Brand STRATEGY

To appeal to a creator you must celebrate the creative process while inspiring self-expression. Brands that provide the means or tools to express themselves creatively with freedom of choice would be well-positioned with the Creator Archetype. Their communication should stir the desire for the creative process and inspire their customers to express their nature to the best of their ability. Creator brands leverage their audiences' imagination and their desire to create and innovate.

# *The* INNOCENT

BRAND VOICE	DRIVEN BY	FEARS
<i>Optimistic</i> <i>Honest</i> <i>Humble</i>	<i>Happiness</i> <i>Morality</i> <i>Simplicity</i> <i>Honesty</i> <i>Positivity</i>	<i>Anguish</i> <i>Depravity</i> <i>Complexity</i> <i>Negativity</i>

## Brand PERSONALITY

The innocent is a positive personality with an optimistic outlook on life. They crave safety but ultimately, they want themselves and everyone else to be happy. They are honest and pure and have no ill will towards anybody. They don't hold grudges and believe everyone has the divine right to be who they truly are. They see beauty in everyone and have a knack for seeing inner beauty that others don't.

## Brand STRATEGY

To appeal to an innocent, you need to earn their trust with simple, honest, and most importantly, positive communication. Negative or guilt-based communication is a complete turnoff. They need to associate your brand with safety and will feel a connection when their inner beauty is recognized.



# *The* SAGE

BRAND VOICE	DRIVEN BY	FEARS
<i>Knowledgeable</i> <i>Assured</i> <i>Guiding</i>	<i>Wisdom</i> <i>Intelligence</i> <i>Expertise</i> <i>Information</i> <i>Influence</i>	<i>Anguish</i> <i>Ignorance</i> <i>Insanity</i> <i>Powerlessness</i> <i>Misinformation</i> <i>Inaccuracy</i>

## Brand PERSONALITY

The Sage is a seeker of truth, knowledge, and wisdom. Their drive comes from the desire to not only understand the world but also to share that understanding with others. They are life-long learners and enjoy expressing their knowledge with philosophical conversations. They are more likely to pass on their wisdom to someone who can use it to change the world, rather than change the world with it themselves.

## Brand STRATEGY

To appeal to a sage you need to pay homage to their intelligence as you communicate. Higher-level vocabulary with layered or philosophical meaning will be acknowledged and appreciated while oversimplified or dumbed-down messages will not. They expect factual and well-researched information, which should be watertight to avoid challenges.

# *The* EXPLORER

BRAND VOICE	DRIVEN BY	FEARS
<i>Exciting</i> <i>Fearless</i> <i>Daring</i>	<i>Adventure</i> <i>Exploration</i> <i>The Unknown</i> <i>Self Discovery</i> <i>Liberation</i>	<i>Confinement</i> <i>Immobility</i> <i>Entrapment</i>

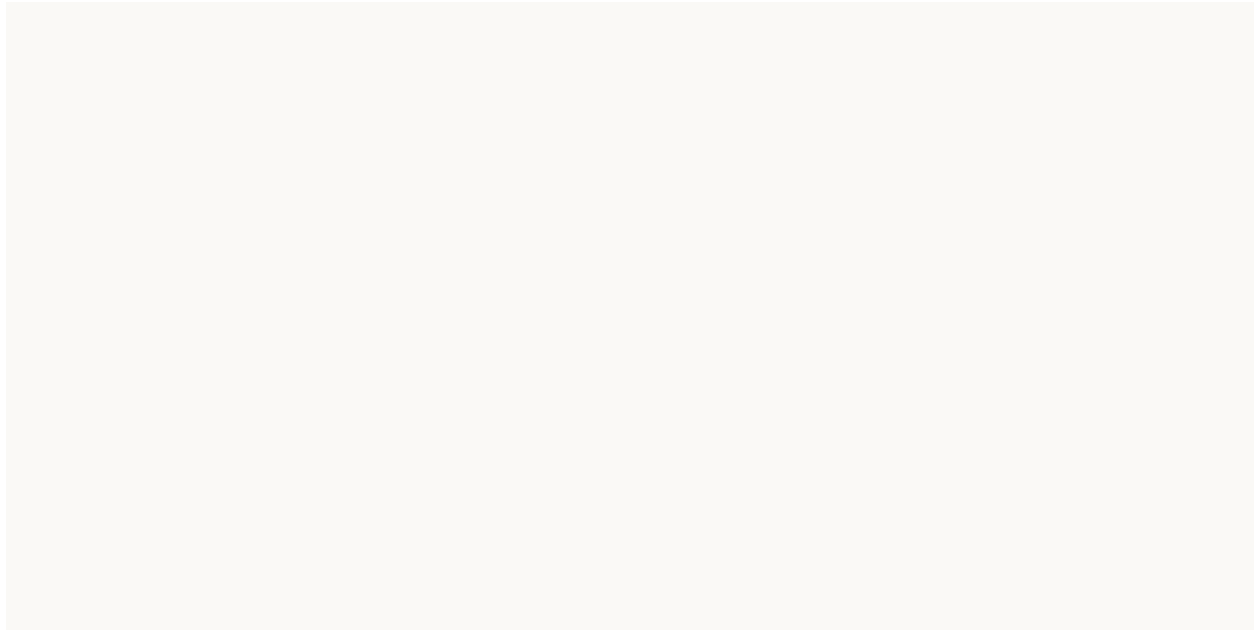
## Brand PERSONALITY

The explorer has a palpable inner drive to push themselves outside their comfort and conformity of everyday life; into the rugged environment, they feel at home in. They are brave, adventurous, and love a challenge. The challenges are more about understanding themselves than proving to others and they are on an everlasting journey of discovery.

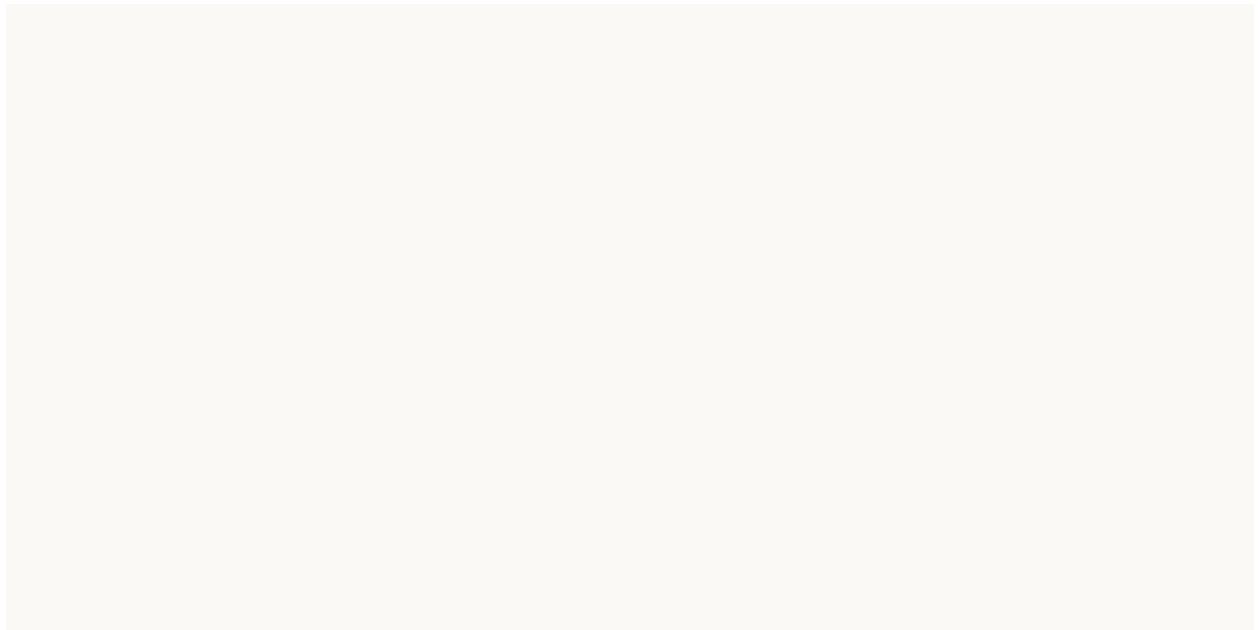
## Brand STRATEGY

To appeal to an explorer, you need to challenge them. Challenging the confines of modern life will also allow you to resonate with them quickly. You should promote the outdoors and the unknown as the land of the free and challenge them to explore it, with your brand of course. Modern society is the common enemy in which many explorers live. A stand against such conforms can go a long way to resonating with the explorer and evoking their desires.

What is your primary brand archetype and how does it apply to your brand?



What is your secondary brand archetype and how does it apply to your brand?



## LESSON THREE

# Crafting *compelling* MESSAGING

Your Brand Message should make the connection for your target audience on why they need what you are selling. Add your own flair and make it personal. Use your target audience profile to speak to pain points and desires that your customer has and how you can help them. Use your brand positioning statement as a basis for all of your communications.

### CLARIFY YOUR MESSAGE

WHAT

WHO

for

HOW

by

WHERE

WHEN

WHY

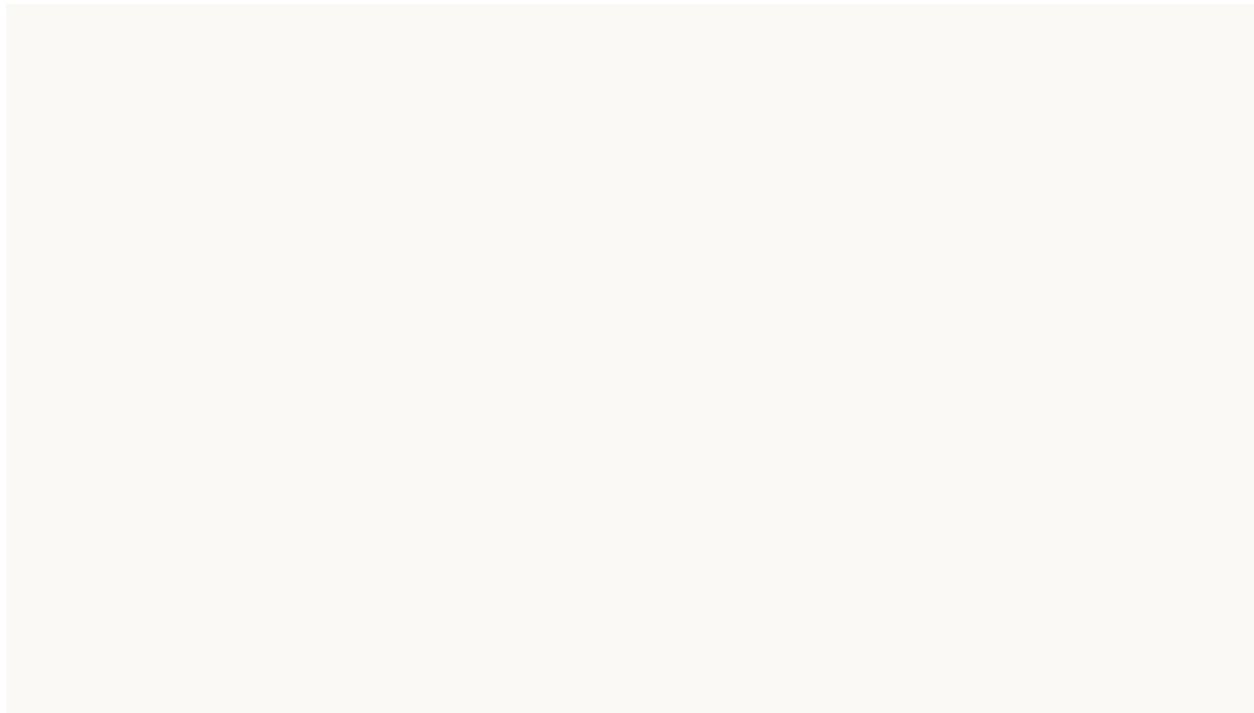
because

*Not sure if you've got your messaging right? Check your brand messages against the following criteria:*

- Does your core brand message offer anything different from your competitors?
- Are your messages simple, easy to understand, and compelling?
- Do your messages reflect reality? Brand messages must be based on reality to be believed. A little aspiration is okay, so long as you are moving in that direction and the claim is plausible.
- Do your messages resonate with your target audience? Do they say anything interesting?

## BUILD YOUR BRAND VOCABULARY

List out the keywords and phrases you use often in your brand messaging



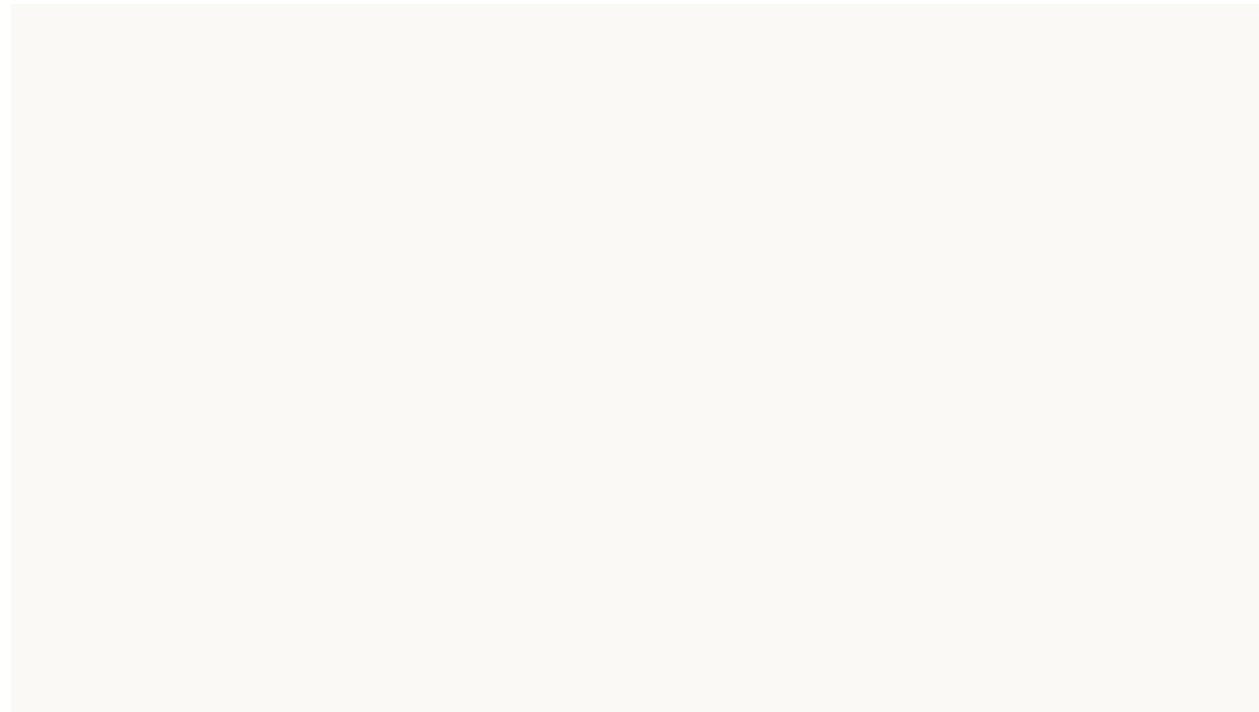
## DEVELOP TAGLINE(S)

Taglines are memorable, short pieces of copy that easily explain your brand essence and communicate your mission.

Your tagline can be:

- descriptive - describes your product, service, or brand promise
- imperative - commands action, usually starts with a verb
- specific - expresses the brand or reveals the business category
- superlative - positions the brand as the best in the market
- provocative - thought-provoking, usually in the form of a question

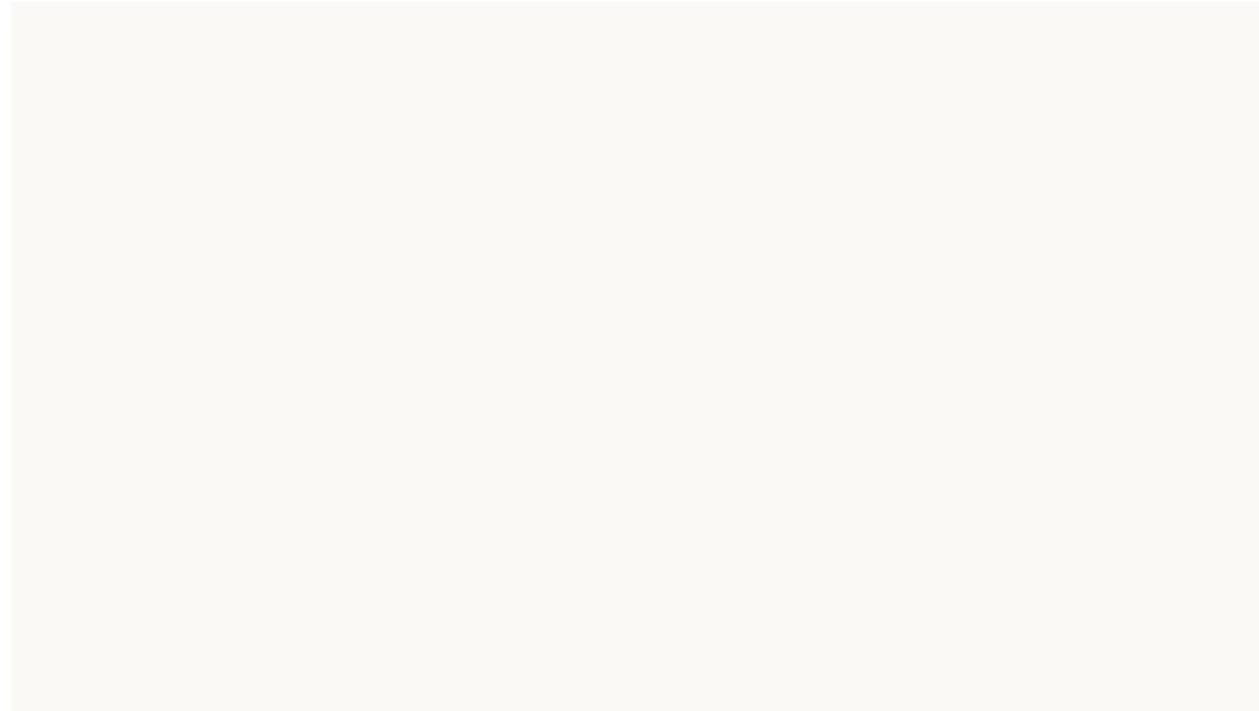
Create a couple of taglines you can use with your brand.



## CREATE CORE MESSAGES

Your core messages are shorthand statements that sum up who you are, what you do, why you do it (think elevator pitch and one-liner). They can be about things like who you serve, how they need help, or a key benefit they get.

Write 4-5 core messages that you can share with your audience.



## IDENTIFY YOUR BRAND STORIES

Your messaging pillars are the key stories you want to tell about your brand—what makes you unique and different. Every piece of content you create should reinforce these core messages across all touchpoints.

## *Origin Story*

- Where did you come from?
- What was a low point for your career or life?
- What was the turning point?
- What makes you credible to help now?





## *Why Stories*

- Why do you do the work that you do?
- Why are you passionate about helping people in this area?
- Why do you work with the people that you do?
- What drives you to get up and work each day?
- Was there ever a time in your life that you needed the work that you do?



## *Human Element Story*

- What hobbies do you have outside of your work?
- What is your family life like?
- What's your favorite TV show? Book? Podcast?
- What are you unreasonably passionate about?
- What's something you're really bad at?
- Where have your travels taken you?



## *Brand Value Stories*

- Identify your top 3-5 brand values
- Explain why one (or all) of these values is important to you
- Tell your audience how you live this value out loud



## *Client/Customer Story*

- Describe the client (any details you can provide deepens the connection with ideal clients)
- Explain what was wrong. Why did they want/purchase your product or service?
- How did s/he FEEL before working together
- What did you do for them?
- What was the result?
- How did you improve his/her situation? Or life?
- How did they FEEL after?

## *Teaching Stories*

- Lesson learned
- Advice to your audience
- Celebrity that lives what you're teaching
- A parable or metaphor to illustrate a lesson
- Lessons from history



## LESSON FOUR

# CONTENT *strategy* brainstorm

Use this content brainstorming exercise to start connecting the dots between your messaging and your content so that the messaging you've just developed can be communicated through your regular organic content. You can use this to create content topics and prompts for your marketing.

List hyper-specific scenarios your audience will encounter in the next few weeks/months.

Example (for a relationship coach): "Seeing family over holidays, facing judgmental comments about being single in their 30s."

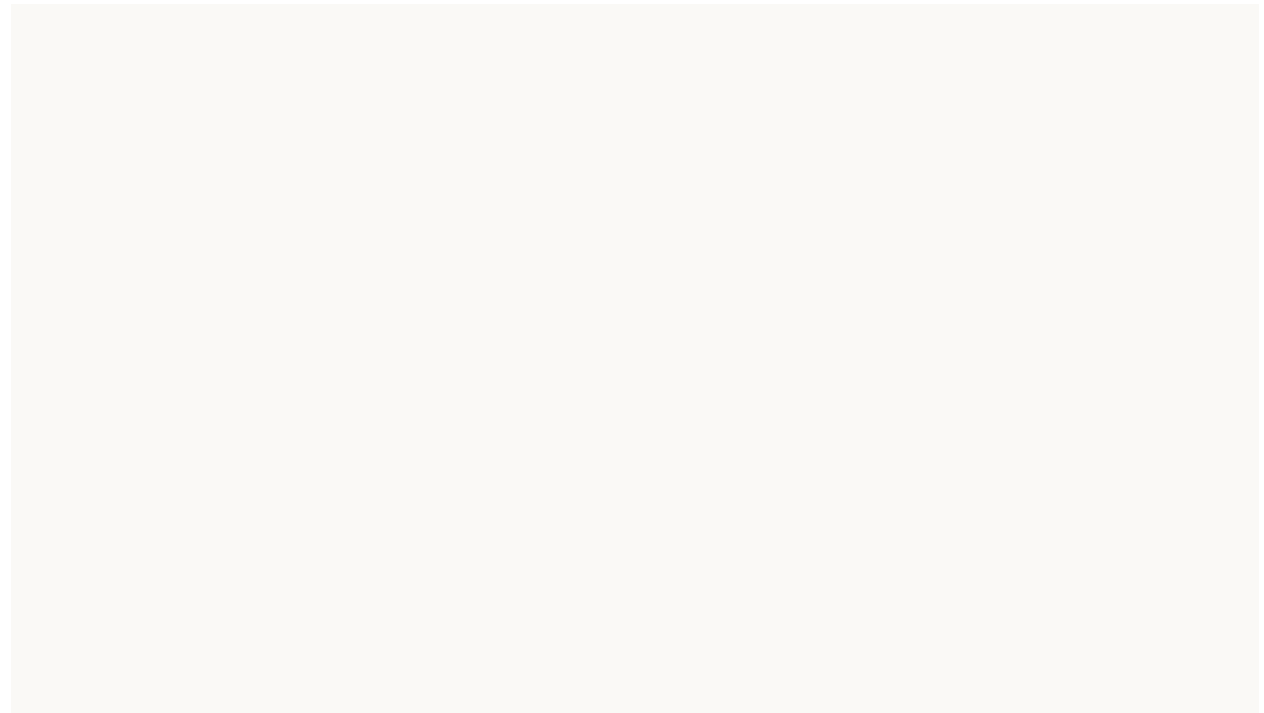
Identify emotions tied to the scenarios.

Example: "Shame, frustration, anger, loneliness" or "Empowered, vindicated, confident."

Explore potential behaviors or reactions.

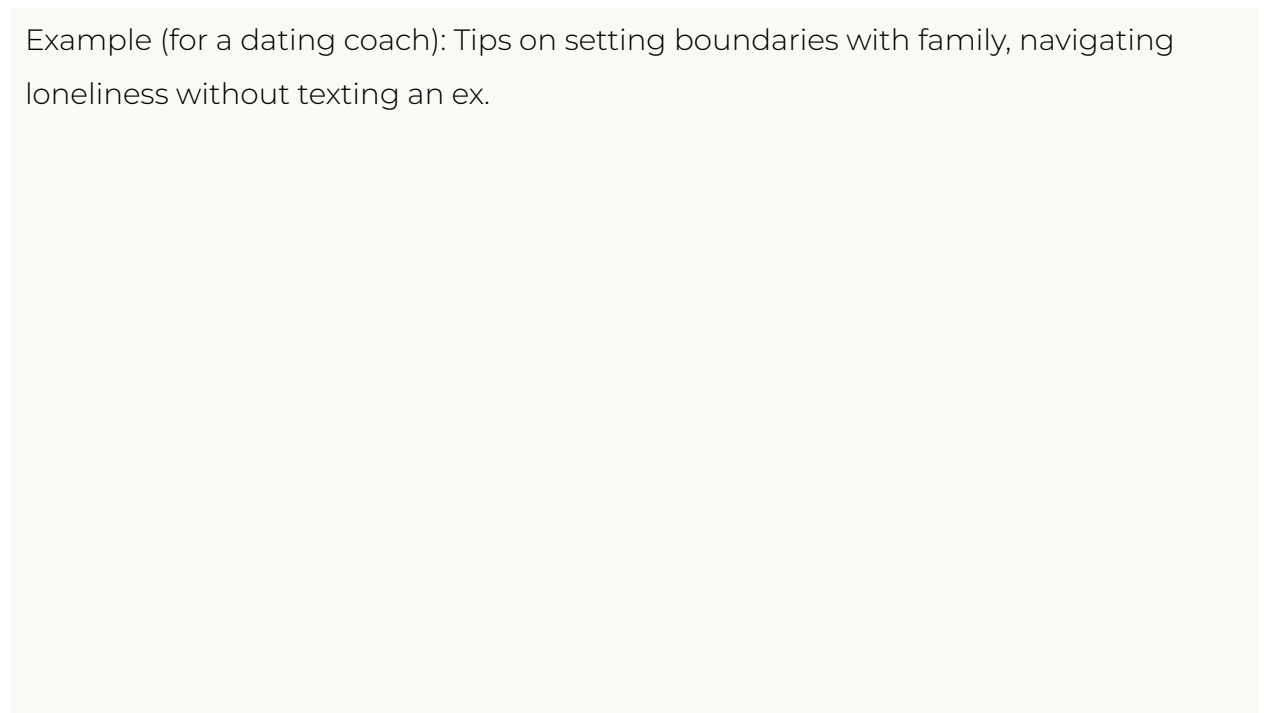
Example: "Texting toxic ex, scrolling dating apps, doubling down on self-care."

Understand any goals they're trying to achieve in their current season.



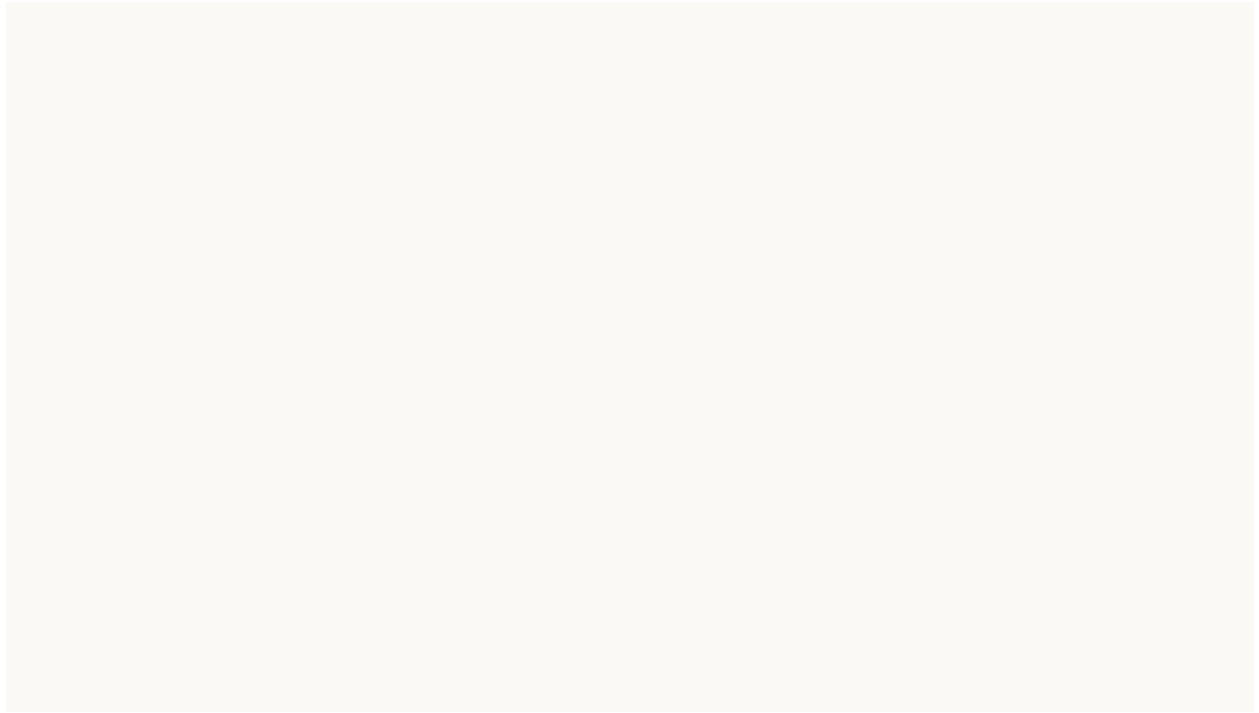
Brainstorm ways to support them based on their experiences.

Example (for a dating coach): Tips on setting boundaries with family, navigating loneliness without texting an ex.

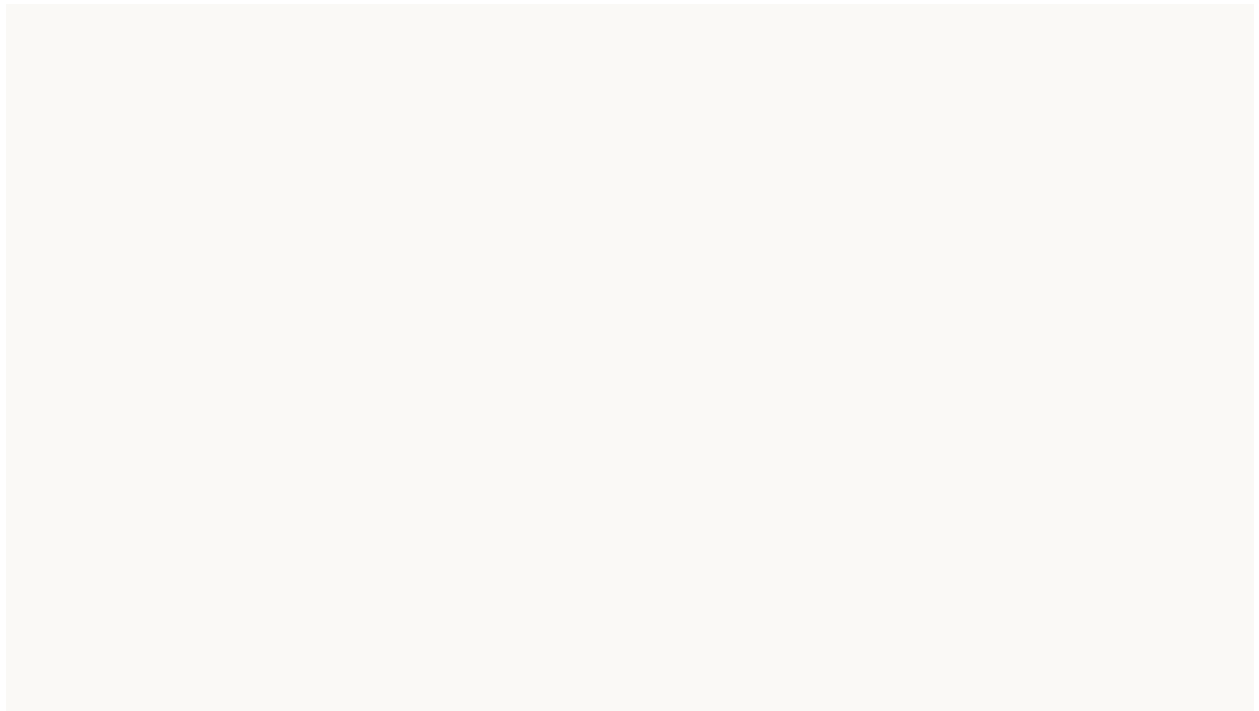




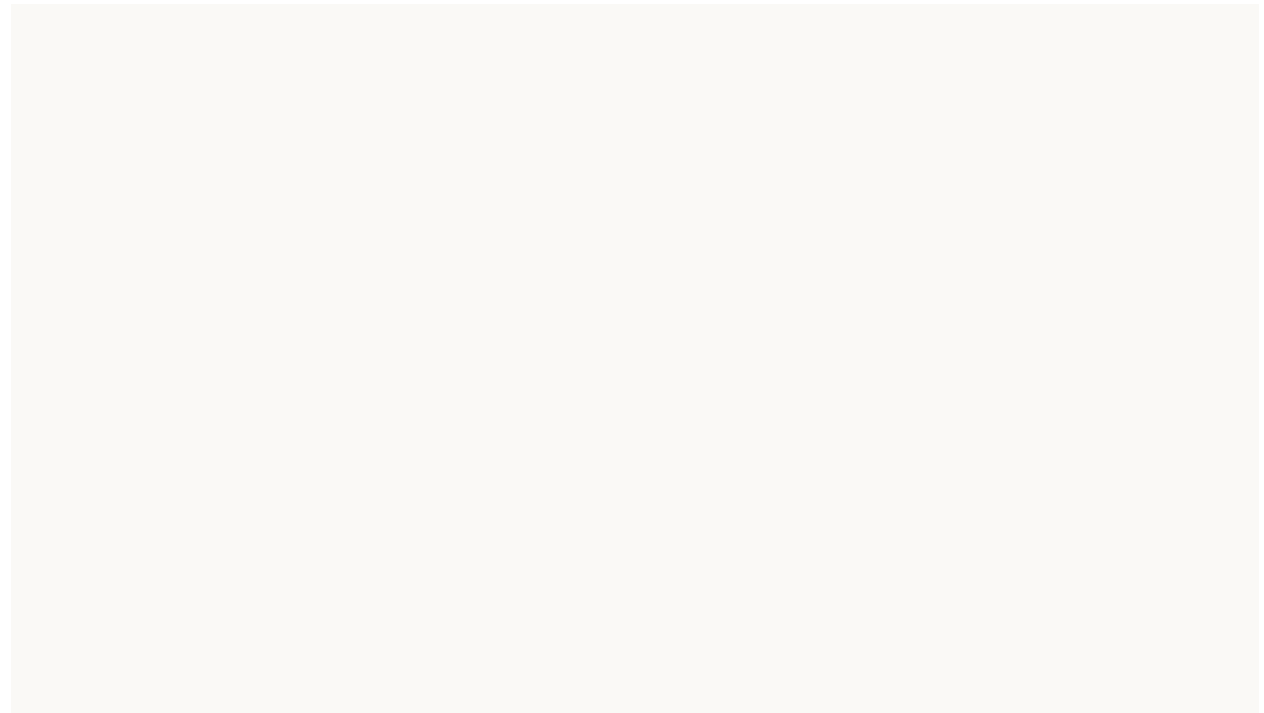
Revisit specific problems arising from their current scenarios.



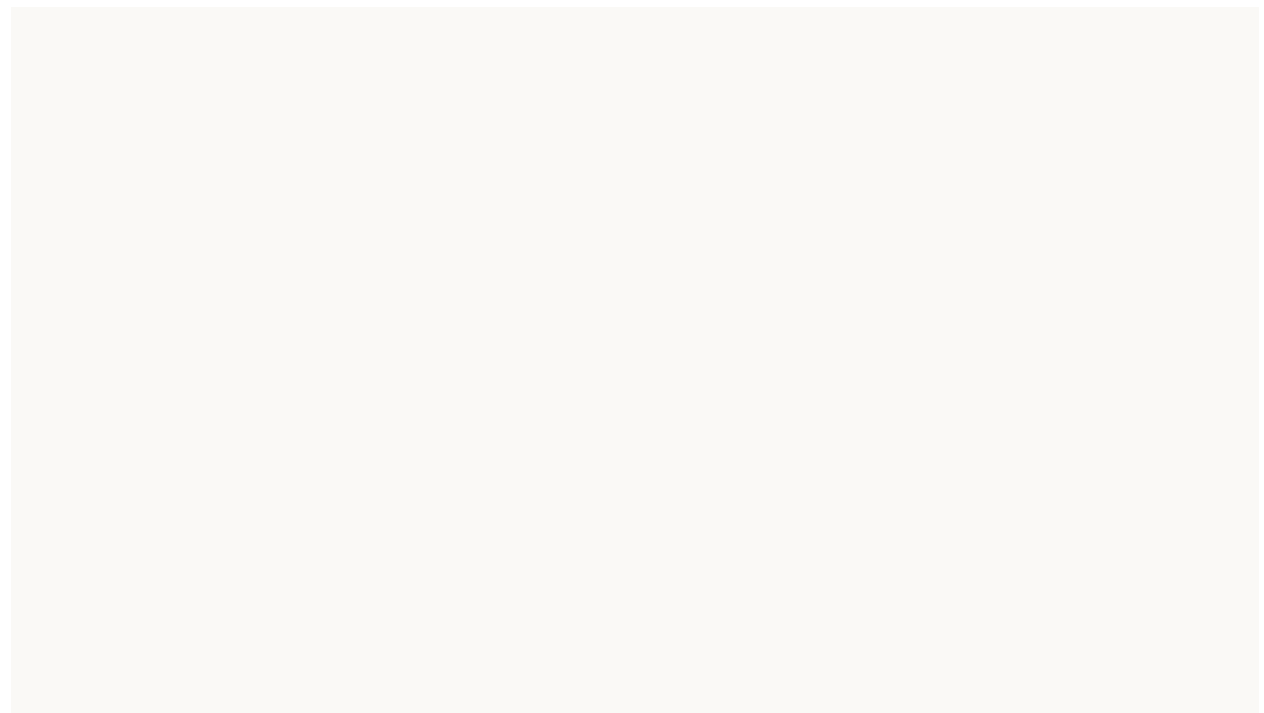
Identify expert advice they need.



Explore helpful mindset shifts.



Determine practical tools they need to apply.



Define where they desire to be and how they want to feel.



# *Adjective* Word Bank

The following adjectives describe our brand's voice and personality. They define how you will show up across digital and physical ecosystems, and how you'll say what you do. These adjectives are how you want our brand to be perceived as a whole as well as what will separate you from your competitors.

- |                   |                  |                  |
|-------------------|------------------|------------------|
| 1. Authentic      | 18. Dependable   | 35. Inspiring    |
| 2. Adventurous    | 19. Dynamic      | 36. Innovative   |
| 3. Approachable   | 20. Eclectic     | 37. Inviting     |
| 4. Artistic       | 21. Elegant      | 38. Joyful       |
| 5. Bold           | 22. Energetic    | 39. Lively       |
| 6. Calm           | 23. Enlightened  | 40. Luxurious    |
| 7. Captivating    | 24. Enthusiastic | 41. Modern       |
| 8. Caring         | 25. Experimental | 42. Motivational |
| 9. Charismatic    | 26. Expressive   | 43. Nurturing    |
| 10. Classic       | 27. Fresh        | 44. Optimistic   |
| 11. Clever        | 28. Friendly     | 45. Passionate   |
| 12. Compassionate | 29. Fun          | 46. Playful      |
| 13. Confident     | 30. Gracious     | 47. Polished     |
| 14. Contemporary  | 31. Genuine      | 48. Practical    |
| 15. Creative      | 32. Happy        | 49. Professional |
| 16. Cultured      | 33. Imaginative  | 50. Quirky       |
| 17. Daring        | 34. Impactful    | 51. Radiant      |

- |                   |                   |                    |
|-------------------|-------------------|--------------------|
| 52. Rebellious    | 68. Sweet         | 84. Fast-paced     |
| 53. Relaxed       | 69. Thoughtful    | 85. Groundbreaking |
| 54. Reliable      | 70. Trustworthy   | 86. High-tech      |
| 55. Resourceful   | 71. Unique        | 87. Humble         |
| 56. Romantic      | 72. Upbeat        | 88. Impactful      |
| 57. Sassy         | 73. Vibrant       | 89. Inclusive      |
| 58. Savvy         | 74. Visionary     | 90. Innovative     |
| 59. Sensational   | 75. Wholesome     | 91. Intuitive      |
| 60. Serene        | 76. Wise          | 92. Motivating     |
| 61. Sophisticated | 77. Youthful      | 93. Pioneering     |
| 62. Spirited      | 78. Zen           | 94. Resilient      |
| 63. Spontaneous   | 79. Ambitious     | 95. Sustainable    |
| 64. Strong        | 80. Adventurous   | 96. Visionary      |
| 65. Stylish       | 81. Collaborative | 97. Witty          |
| 66. Supportive    | 82. Empowering    | 98. Driven         |
| 67. Sustainable   | 83. Engaging      | 99. Inquisitive    |
|                   |                   | 100. Balanced      |

*module six*

# Your Blueprint

CREATE A CLEAR AND CONCISE  
BRAND STRATEGY DOCUMENT

## LESSON ONE

# Creating your *brand strategy* BLUEPRINT

Now that you've worked through all the aspects of your brand strategy, you can pull it all together to create a clear and concise brand strategy document. This will be your BLUEPRINT for building your brand.

### STEP ONE: REVIEW YOUR THOUGHTS

Start by reviewing everything you've mapped out in the workbook. Revisit each of the exercises and make edits and refinements as needed. Remember this isn't a linear process. There will inevitably be some back and forth so this is when you can look at everything as a whole and make sure things are aligned. As you read through everything you wrote, look at it through the lens of your ideal client. Consider how they will perceive and interact with the things you've developed.

### STEP TWO: EDIT YOUR STRATEGY

As you review your thoughts from the workbook, identify areas that need improvement, and fine-tune your approach. Evaluating and improving your brand strategy is like taking a close look at a puzzle you're working on. Sometimes, less is more. Simplify your strategy to make it more accessible and effective.

### STEP THREE: FINALIZE YOUR STRATEGY

Once everything makes sense and is aligned and clarified well, you'll create your brand strategy blueprint. Use the templates and frameworks provided to ensure that your blueprint is structured for effectiveness. With this blueprint in hand, you'll be ready to take action and implement your brand strategy blueprint

**[ACCESS THE CANVA TEMPLATE](#)**



## LESSON TWO

# Executing *and* Implementing your STRATEGY

Brand strategy should be applied at the very core of your business, influencing every aspect of your operations and customer interactions. Here are 6 ways you can use a brand strategy in your business daily:

### *Use it in your copy and messaging*

Using a brand strategy in your copy and messaging is all about speaking in a way that's clear and memorable. Start by really understanding your brand - what it stands for and the feelings you want it to evoke. Choose a few keywords that describe your brand and use them in your messages.

Share your brand's story in a simple, relatable way, and maintain consistency in your tone and style across all platforms. Tailor your messages to connect with your specific audience and keep things straightforward - the most effective messages are often the simplest. And always, be truthful about your brand; honesty is a trust-builder.

### *Use it in your marketing*

Using a brand strategy in marketing is like making your brand's personality shine through all your marketing efforts. First, know your brand well, what it stands for, and what makes it unique. Then, in your marketing, use the same colors, logos, and style to make your brand recognizable.

Tell stories that show how your brand can help people, and always speak in a way that matches your brand's personality. Finally, remember that consistency is key; your marketing should always reflect your brand's character and values.

### *Use it to create or refine offerings*

If we're clear on the impact of what we do and what's important to them we can refine what we offer so that it actually makes the impact the buyer is looking for. Knowing why our clients buy, also allows us to identify more products or services that they'd value.

### *Use it when designing your brand identity*

Using a brand strategy to design a brand identity means creating a visual look and feel that matches what your brand stands for. Start by understanding your brand's values and what makes it special. Then, choose colors, fonts, and logos that reflect these values.

Make sure all your visual elements are consistent across your website, social media, and marketing materials. This way, when people see your brand, they instantly recognize it and know what you're all about. Keep it simple, and let your brand's personality shine through in your design choices.

### *Use it when curating brand imagery*

Curating brand images with a brand strategy means choosing pictures and visuals that show what your brand is all about. First, understand your brand's personality and what it wants to say. Then, pick images that match this personality. Use these images in your website, social media, and ads to give people a clear idea of your brand's character.

Consistency is vital, so always use images that fit your brand's style. It's like painting a clear picture of your brand with visuals, making it easier for people to connect with your message.

### *Use it when creating your website*

Building a website with a brand strategy means creating a digital place that reflects your brand's character and purpose. Start by understanding what your brand stands for and what you want to tell your visitors. Choose colors, fonts, and images that match your brand's personality and values. Make sure your website layout and content are consistent with your brand's message. It's like designing a digital home for your brand, a place that speaks the same language and feels welcoming to your audience.

## LESSON THREE

# Adapt *and* evolve your BRAND

Use this brand evaluation checklist to make sure your brand is staying aligned as you continue to grow and evolve over time. You can come back to this time and time again to pinpoint any areas that need to be realigned within your brand strategy.

### *Vision, Mission, Values*

- Are your vision, mission, and values still aligned with your business goals and purpose?
- Do they resonate with your current audience and industry?

### *Target Audience*

- Has your target audience evolved or shifted? Are your current strategies aligning with their needs?
- Are you effectively reaching and engaging your target audience through various channels?

### *Unique Selling Proposition (USP)*

- Does your USP still set you apart in the market?
- Have competitors adopted similar strategies, and do you need to adjust your positioning?

### *Brand Messaging*

- Is your messaging consistent across all platforms?

- Does your messaging align with current industry trends and customer expectations?

### *Brand Voice*

- Is your brand voice still resonating with your target audience?
- Does your voice need adjustment based on shifts in industry or cultural trends?

### *Visual Identity*

- Review your logo, color palette, and other visual elements. Do they align with your current brand image?
- Is your visual identity consistent across all platforms?

### *Brand Experience*

- Assess the overall customer experience. Is it aligned with your brand promise?
- Are customer interactions, both online and offline, reinforcing your brand values?

### *Market Positioning*

- Evaluate your current market position. Does it need adjustment based on industry changes?
- Assess your competitors' positioning and determine if any shifts are required.

### *Social Media Presence*

- Review your social media strategy. Is it effectively conveying your brand personality?
- Ensure your social media content aligns with your current brand messaging.

### *Website Audit*

- Conduct a thorough audit of your website. Does it reflect your current brand strategy?
- Check for any outdated information or features that need updating.

### *Brand Consistency*

- Ensure consistency across all touchpoints—online and offline.
- Check marketing materials, emails, and any external communications for coherence.

### *Performance Metrics*

- Review key performance indicators (KPIs) related to your brand. Are you meeting your goals?
- Adjust strategies based on data insights and performance analytics.

### *Future Alignment*

- Consider emerging trends and changes in your industry. How can your brand stay aligned with future developments?

*Congratulations*

Now you've got the CLARITY  
you need to build your brand  
with CONFIDENCE.

YOU'RE ARMED AND READY TO BUILD YOUR BRAND

Ready for the next step? DIY branding has served you well until now, but at this point you need something more in order to get to the next level of building your brand. Save time and money as you build your brand and easily go from embarrassed to empowered.

Semi-custom brand templates are for emerging online brands that need an affordable polished look. These pre-made brand templates are best for those who are just starting their business, who are on a tight budget, or who need a quick turnaround but still want to feel confident in their brand.

SHOP THE BRAND TEMPLATES