



# Brand Strategy Toolkit



**\*Caution:** Entering the toolkit in a browser will not provide an option to save your work. Instead, kindly download the PDF version and save it as you progress.

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We've gathered all the necessary tools, tips, and templates for you to construct a brand from scratch. Follow along sequentially or select any specific tool directly from the list provided.

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For more step-by-step guidance, see our [How to Craft a Brand Strategy](#) blog article.

# Personas Template

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**Recognize your audiences to  
comprehend how your brand can  
cater to their distinct needs.**

For more instructions on how to use this template, see our [How to Create Marketing Personas](#) blog article.



**Persona 1****Persona 2****Persona 3**

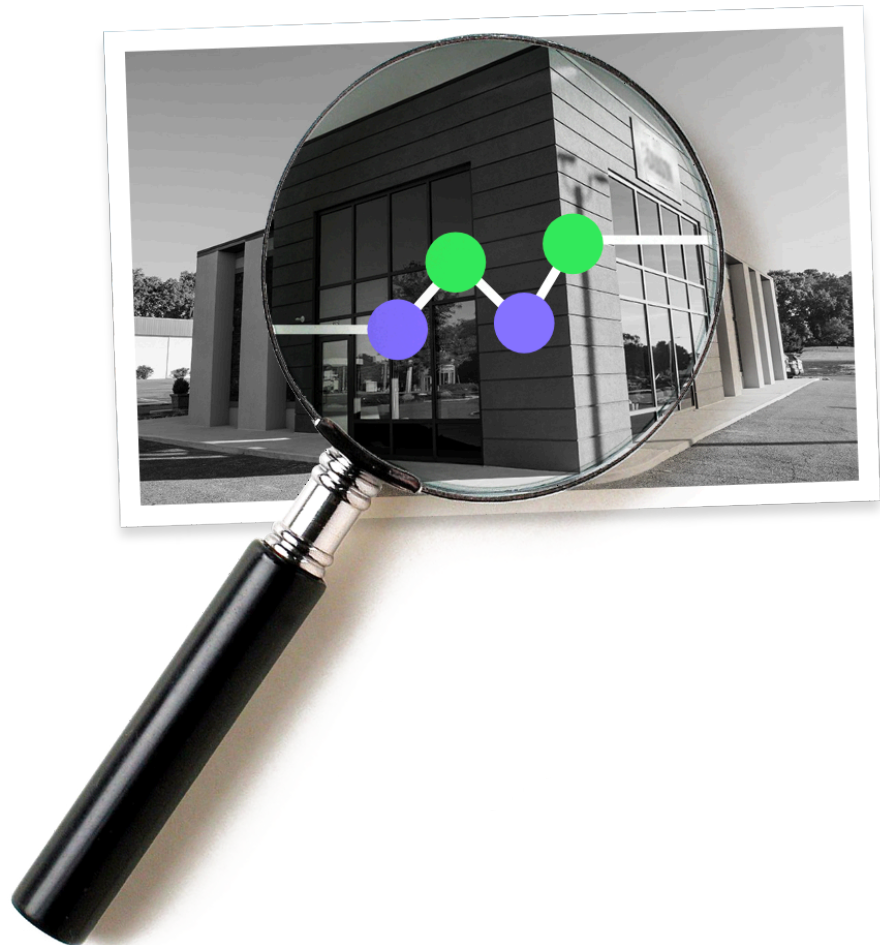
	<b>Persona 1</b>	<b>Persona 2</b>	<b>Persona 3</b>
<b>Name</b>			
<b>Age</b> (if applicable)			
<b>Gender</b> (if applicable)			
<b>Job title</b> (if applicable)			
<b>Channels</b> (where you can connect with them)			
<b>Goals</b> (what they want)	1.  2.  3.	1.  2.  3.	1.  2.  3.
<b>Pain points</b> (the barriers to what they want)			
<b>How your product/service helps solve problems</b> (the messages you want your content to convey)			

# Competitive Analysis Template

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Recognize your competitors to distinguish your brand effectively.

For more details on using this template, see our [How to Complete a Competitive Analysis](#) blog article.



	Brand 1	Brand 2	Brand 3
Competing brands			
Brand Soul (purpose, vision, mission, values)			
Brand look/feel			
Value proposition			
Tagline			
Core products/services			
Customer personas			
How they talk about their customers			
Customer acquisition			
Marketing channels			
Advertising channels			
Sales channels (if applicable)			
Revenue			
Strengths			
Weaknesses			
Similarities			
Differences			

# Brand Soul Workbook

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Establish your purpose, vision, mission,  
and values to construct a brand  
founded on a strong base.

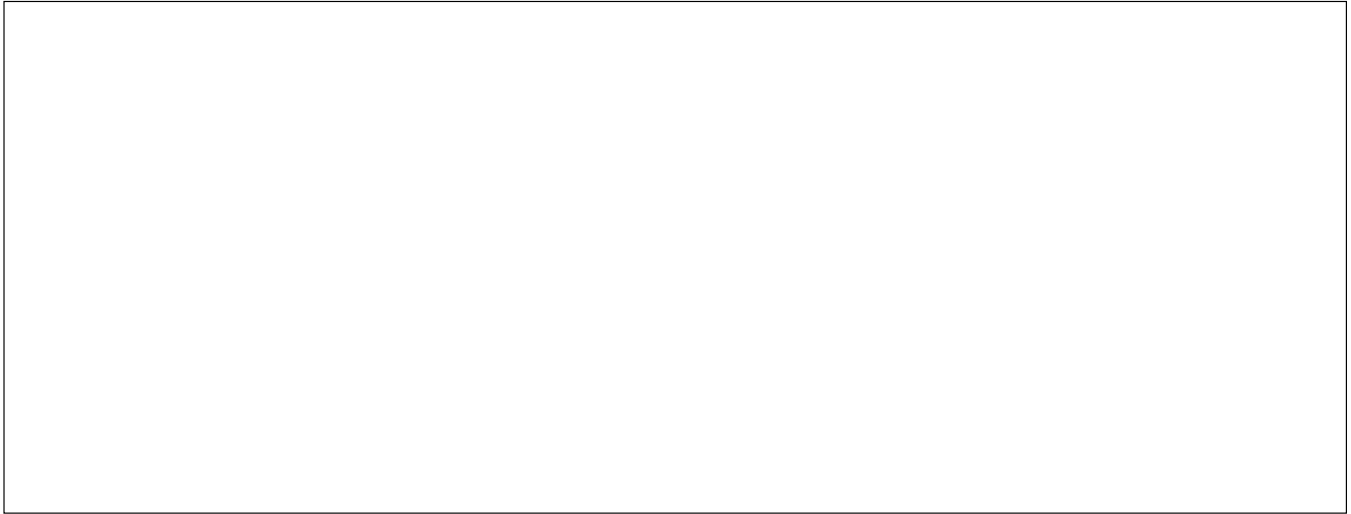
For detailed directions to complete this exercise, follow our  
[How to Find Your Brand Soul](#) blog article.



# Purpose

## ➔ Why do we exist?

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## Examples

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### **Kelp Creative Agency**

We exist to help our clients effectively express their brand through media - bridging the gap between their hearts/minds and their market.

### **McDonalds**

To be the world's best quick service restaurant experience. Be it for convenience, menu variety or value for money.

### **Uber**

To bring transportation as reliable as running water everywhere for everyone.

### **Starbucks**

Starbuck's brand purpose is to inspire and nurture the human spirit—one person, one cup, and one neighborhood at a time.

### **Harley-Davidson**

To fulfill the dream of freedom through the experiences of motorcycling.

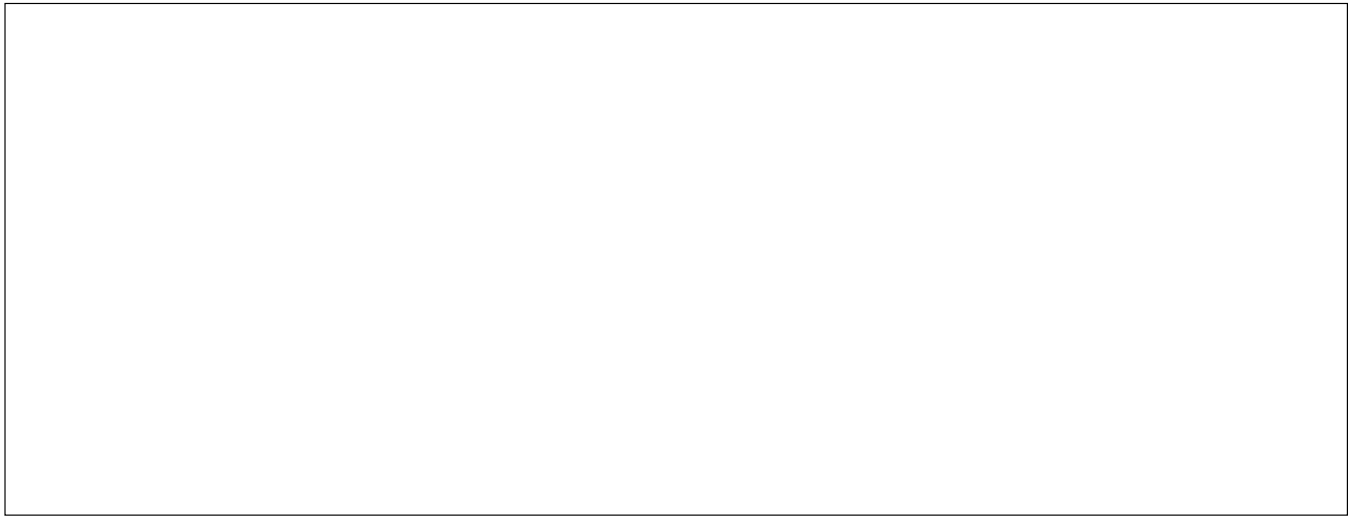
### **Tesla**

To accelerate the world's transition to sustainable energy.



# Vision

- ➔ **What future do we want to help create?  
What does the future look like?**
- 



## Examples

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### **Kelp Creative Agency**

Our vision at Kelp is to create a future where exceptional creativity and ingenuity can positively transform brands and businesses locally and worldwide. We aspire to lead the industry with our unparalleled creative, branding, and development services that drive innovation, inspire change, and foster growth for our clients.

### **Tesla**

To create the most compelling electric car company of the 21st century.

### **Walmart**

Be the destination for customers to save money, no matter how they want to shop.

### **Dunkin'**

To be always the desired place for great coffee beverages and delicious complementary doughnuts & bakery products to enjoy with family and friends.

### **Teach for America**

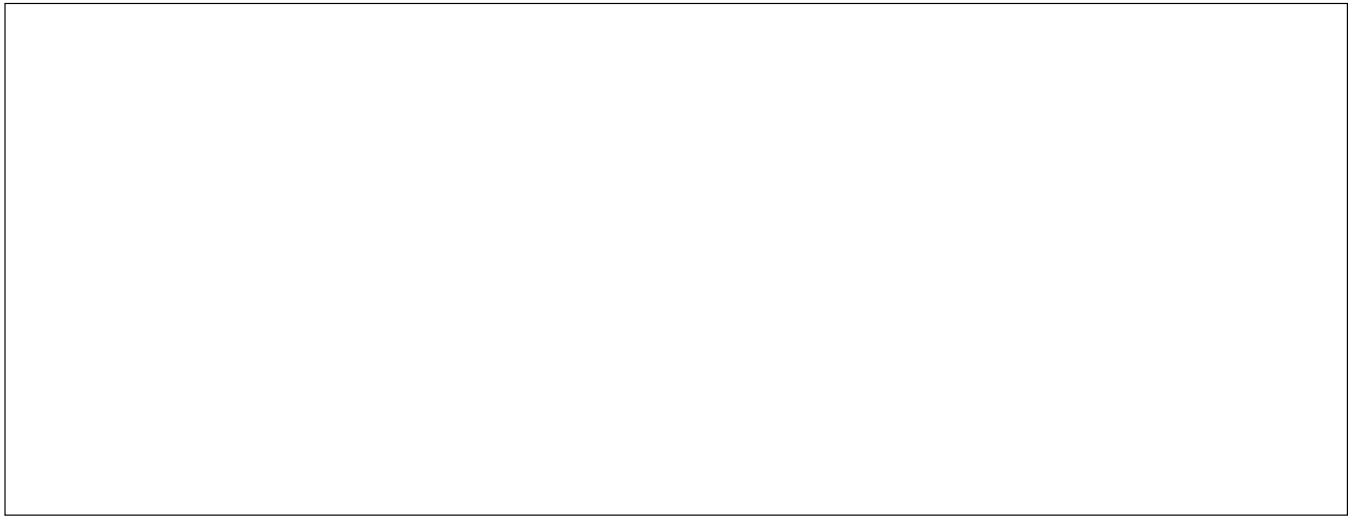
One day, all children in this nation will have the opportunity to attain an excellent education.

### **Alzheimer's Association**

A world without Alzheimer's disease.

# Mission

- ➔ **What are we here to do?**  
**How do we create that future?**
- 



## Examples

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### **Kelp Creative Agency**

To create good work for good people. Bridging the gap between their hearts/minds and their market so that we cultivate relationship.

### **Disney**

To create happiness for people of all ages, everywhere.

### **Harley-Davidson**

To fulfill dreams of personal, All-American freedom.

### **Coca-Cola**

To refresh the world in mind, body and spirit. To inspire moments of happiness.

# Values

## ▶ How will we maintain our conduct in support and pursuit of our mission, vision, and purpose?

You can include as many as you like, but 3-5 is a healthy start.

## Examples

### Kelp Creative Agency

#### 1. Reliable

We strive to be reliable in all aspects of our services, from creative content to development.

#### 2. Honest

Our commitment to it is reflected in our promise to ensure that all of our content and services are authentic, accurate, truthful, and free from any deceptive or misleading practices.

#### 3. Passionate

Our team has an unwavering commitment to excellence and is always looking for fresh ideas that will help create unique experiences for our clients.

### Dunkin'

#### 1. Honesty

You can always recover from the truth.

#### 2. Responsibility

Own the outcome whether it's good or bad.

#### 3. Respect

Give people their dignity and earn others' respect.

#### 4. Humility

It's about the team. Never lose sight of those who helped along the way or those less fortunate in our communities.

# Brand Voice Questionnaire

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Recognize your brand voice to add a personal touch to your brand and ensure consistent communication across all content.

For more detail on using this template (as well as additional exercises), see our [How to Find Your Brand Voice](#) blog article.

➔ **1) When people interact with our brand, how do we want them to feel?**

For example, a security company that wants to be perceived as a trusted protector would use a confident and reassuring voice.

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

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

➔ **2) What adjectives would we use to describe our brand?**

Choose 3-5 adjectives. For example, toy brand might describe themselves as playful, silly, and adventurous.

➔ **4) What is another brand with a voice we love?**

Don't emulate them directly, but identify how and why their voice resonates with you.

➔ **5) If our brand were a celebrity, who would we be?**

For example, a hip luxury suit brand might describe themselves as George Clooney's younger brother.

➔ **7) Who do we NOT want to be/what do we want to avoid?**

Identify buzzwords you hate, phrases to avoid, etc.

➔ **6) How do we want to talk about ourselves?**

Think about your brand messaging, what you want to convey, the type of language you use, etc.

# Brand Messaging Template

Define your value proposition, tagline, and messaging pillars to help content creators maintain a cohesive brand narrative.

For more detail on how to use this template, see our [How to Craft Your Brand Messaging](#) blog article.



Tagline \_\_\_\_\_



Value prop \_\_\_\_\_



Brand Messaging Pillars \_\_\_\_\_

Pillar 1

Supporting point

Supporting point

Supporting point

Pillar 2

Supporting point

Supporting point

Supporting point

Pillar 3

Supporting point

Supporting point

Supporting point

# Brand/Rebrand Questionnaire

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Analyze the current state of your branding to identify the changes you seek to implement moving forward.



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## Current Core Identity

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### ➤ 1) Organization name

List the way you want it on the logo and any other derivatives.

### ➤ 2) What does our business do?

Use a succinct, objective description.

### ➤ 3) What is our Brand Soul?

List your purpose, vision, mission, and values.

### ➤ 4) How is our brand currently perceived? Does it align with our Brand Soul?

### ➤ 5) How do we want to be perceived?

➤ 6) How has our brand changed over time?

➤ 9) How do we differentiate our brand?

➤ 7) Who is our audience?

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

➤ 10) What is our current brand personality?

Place an X where you want your brand to fall on the spectrum below.

Traditional	_____	Progressive
Exclusive	_____	Accessible
Corporate	_____	Friendly
Serious	_____	Fun, Playful
Understated	_____	Bold
Simple	_____	Complex
City, Urban	_____	Natural
Familiar	_____	Disruptive
Steady	_____	Dynamic
Realistic	_____	Idealistic



# Current Visual Identity

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- **1) What does our current visual identity look like?**

Describe logo, color, typography, etc.

- **2) What does our current visual identity communicate?**

- **6) How do we feel about our current logo?**

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

- **3) How does our current visual identity align or misalign with our values?**

- **4) What do we NOT like about our current visual identity?**

- **5) How has our visual identity changed over time?**

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

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

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

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

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



**Logomark**

A symbol or abstract representation of the brand (e.g., Nike’s swoosh, McDonald’s arches, etc.).



**Logotype**

Stylized letters representing the brand’s name (e.g., Coca-Cola, Dell, FedEx, NASA, etc.).



**Combination mark**

A logo that uses a combination of both words and symbols to represent the brand (e.g., AT&T, Domino’s, etc.).

# Current Verbal Identity

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## ➔ 1) What differentiates us?

Articulate how you're different from your competitors by filling in this statement: "our [offering] is the only [category] that [benefit]."

## ➔ 2) What is our current tagline?

## ➔ 5) What is our current brand personality?

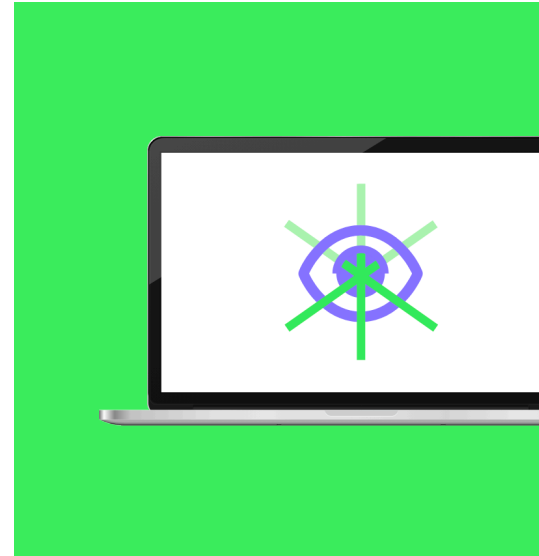
## ➔ 3) What is our current value prop?

## ➔ 4) What are our three main selling points/messaging pillars?

## ➔ 6) What is our current brand voice/tone?

# Visual Identity Checklist

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Develop an all-encompassing and impactful visual identity that conveys your brand identity.

For more detail on designing your brand, see our [How to Craft a Brand Identity](#) blog article.

## ■ Logo

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Design a logo that reflect your brand personality

- Ensure logo design works for web and print.
- Test that it renders well at small sizes.

## ■ Colors

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Curate a simple but flexible palette.

- Choose 1 main color, 2 primary colors, 3-5 complementary colors, and 2 accent colors.

## ■ Typography

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Select type that works as an extension of your logo.

- Identify a primary, secondary, and tertiary typeface
- Consider mixing serif and sans serif.
- Test for legibility in print and on screen.

## ■ Hierarchy

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Create a logical, intuitive system.

- Focus on guiding the viewer through the content easily.
- Include specifications for headers, subheaders, body copy, images, blurbs, etc.

## ■ Photography

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Use consistent, cohesive visual styles.

- Ensure imagery is high quality and high resolution.
- Be mindful of inclusive representation.

## ■ Illustration

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Use illustrations to visually enhance, not overwhelm.

- Choose a single style.
- Keep it simple.

## ■ Iconography

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Focus on simplicity and clarity.

- Double check that icons render clearly at small sizes.
- Make sure the image is relevant to the subject.

## ■ Data Visualization

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Design for comprehension.

- Avoid clashing patterns (use color instead).
- Don't over-illustrate or use 3D charts.
- Order data intuitively (alphabetically, ascending, or descending).

## ■ Video & Motion Graphics

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Keep branding consistent.

- Choose an animation style.
- Provide guidelines for kinetic text.

## ■ Web Design & Interactivity

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Focus on creating the best user experience.

- Consider accessibility.
- Design for mobile.



Still need help to figure it all out?  
Reach out. We'd love to help you bring your brand to life.