

The Brand Plan 2.0

A Blueprint for Your Brand Identity,
Positioning and Messaging Strategy

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Let's Talk About Your Brand Strategy

[Book a Meeting →](#)

The ship has sailed on lackluster brand strategies. Our team is ready to help you hoist your colors proudly.

Introduction

It's very likely you already have some fragmented pieces of a brand guide; nearly every non-start-up business does. There's the graphic guidelines that came with your logo. Some blogging pet peeves and notes you've compiled. The brand identity guidelines from a workshop years ago that are getting dusty somewhere within your intranet.

The problem is, they're not doing anything. They're not helping you and they're not moving your bottom line.

What's the point?

In this revised version of [The Brand Plan: A Brand Manual Blueprint from Voice to Visuals](#), we're rethinking the whole branding process with the goal of **operationalizing your brand**. That means creating a customer-centric brand that can impact your organization and your revenue goals in a real, quantifiable way. It means creating an actionable strategy that marries creativity with data and logic.

This guide will cover the creation of that operational brand strategy, from brand identity elements to market positioning and the details of your messaging.

If you already have some pieces of this puzzle — great. If you don't, that's fine too. We break down every step in a way that's simple enough for non-marketers, while still being comprehensive enough to be crucial and insightful for experienced marketing professionals.

When you're ready to start filling in the blanks, take on one section at a time and get the entire relevant team involved. Use mindmaps, brainstorming and open collaboration with the people who have to implement this brand every day. Don't worry about your "finished" product being perfect or grammatically correct. It's more important to be honest and create something useful. And it'll never really be finished if it's updated regularly.



“It's dangerous to go alone! Take this.”
- The Legend of Zelda



Brand Identity

Think of brand identity as your company's DNA.
The core of who you are.

Brand Identity

Your brand story and all of your other brand identity elements are the foundation for all of your communications, woven into everything you do and reflecting your unique personality everywhere you go.

The best strategy for this section is to be **simple, straightforward and crystal clear**.

Instead of trying to fit 10 gallons of purpose into 5 gallon statements, focus on distilling all of that into something so clear and memorable that your whole staff will know it by heart.

Although you may think of some brand identity elements as the formal requirements of a business plan, they should be anything but that. (Unless, of course, that's who you are.)

In a perfect world, every red cent your consumers spend would be because your brand resonated in the trenches of their souls. They want to see why you and your employees work so hard and why that matters. They want to know what you believe in and what drives you. They want products and services with the transformative power to shape who they are and what they're capable of. They want to be moved to spend their hand-earned money.

So tell us why you matter.



Mission

Distill who you are and what you do into a single, simple sentence. Although it's a tempting default, the mission of your company isn't to make money. That's a byproduct of your mission.

Think about the problem you're solving for your customer. What are you really providing beyond the tangible? Safety? Peace of mind? An experience? And to whom are you providing it? Why?

There's a million ways to come at this one, but keep it simple, like this:

We [a verb describing how you solve a problem] [the customer or niche you're targeting] to [the problem you solve] because we believe that [the reason you do it].

Here's our example

Our Mission

To help businesses grow smarter by creating strategies that consider the entire customer experience as we build foundations for their brand, marketing, sales, customer success (and the operations that power them).



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Vision

What do you exist to accomplish? What's your ultimate goal? If it's not obvious, add why. While vision statements aren't goals that are accomplished quickly, many companies survive to see their vision statements come to fruition. Those businesses successful enough to accomplish their vision shape another, aligned with the new ambitions of the company.

Amazing Vision Statements You've Actually Seen Accomplished

Microsoft: "A computer on every desk and in every home."

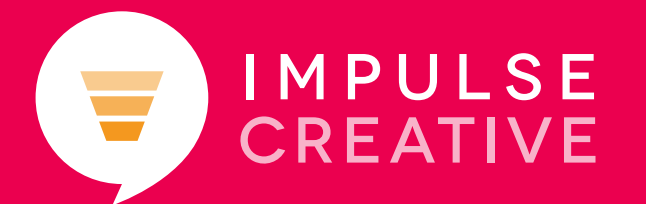
Amazon: "To be Earth's most customer-centric company, where customers can find and discover anything they might want to buy online, and endeavors to offer its customers the lowest possible prices."

Here's our example ↴

Our Vision

To be our customers' partner in transforming their customers' experiences starting from the first touch.

Imagine a world where marketing and sales isn't a department, it's an experience that ties into the fabric of the customer relationship & experience.



Values

If there was ever the perfect place to take a stand either for or against what you believe in, this is it. These are the fundamental values of your brand, the conscience of your company. In fact, one of the easiest ways to create these is to first think about your brand as a person, then try to imagine what their guiding principles or morals would be.

This short list of words or actionable phrases should keep you aligned with your brand essence and be brief enough to use as a “pulse check” for whether a piece of content or a decision is on-brand.

A lot of companies like to have fun with these and create acronyms or use a theme throughout that reflects their brand personality. If you have a lot to say, create a list of understood-at-a-glance headlines, then expand.

(And please don't be formal, not if you also expect these to be accessible to the real humans that need to exemplify them.)

Our Values

Proactive

We foresee and make things happen rather than responding to it after it has happened.

Reliable

We take the initiative to do whatever it takes to get the job done.

Innovative

We are cutting-edge and create a lasting and measurable impact.



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Here's our example

Values Continued...

Your values are a great highlight how you want your brand to feel to others and how you make decisions as an organization.

However, sometimes you need additional context on these values to show your team and the world how you actually uphold these values.

These are your Guiding Principles. They stand alongside your values to show how each person at your organization embodies your values for building your culture, your customers' experiences and your future plans.

Here's our example 

The **H.U.M.A.N.s** of Impulse Creative

Above all else, the people of Impulse Creative are first and foremost, H.U.M.A.N. No matter what our individual focus is, or the job that lay ahead of us, we strive to uphold these H.U.M.A.N. principles.



Helpful

When you have a problem, we'll help you to find a solution, whether you need advice, direction or hands-on help.

Understanding

We ask more questions to cultivate a deep understanding of your business that enables us to design smarter solutions and strategies.

Meticulous

No stone is left unturned in precise, strategic work you can depend on.

Authentic

Genuine people you can trust to be realistic and honest.

Noteworthy

We make an undeniable impact in everything we do for you.

Value Propositions

A value proposition is essentially your pitch. These are short, preferably simple statements explaining the benefits you're selling to potential buyers. Unlike a singular mission statement, you can create as many value propositions as you'd like, for different services, different products or different sectors of your business.

While there's a lot of different ways to approach value propositions (including entire training courses dedicated to the subject), we're focusing on two factors: your unique differentiator and your emotional impact. Understanding both is absolutely a key to success, however you choose to market your brand.

The functional, emotional and social benefits that your unique selling proposition (USP) will have for customers can have multiple value propositions, especially for different products.

Unique Selling Proposition (USP) ~ Emotional Selling Proposition (ESP)

Unique Selling Proposition (USP)

What's the one most important thing that makes you different from your competition? That **specific, unique benefit** or value is your unique selling proposition. It should be short, honest and tell consumers exactly what makes you different from everyone else.

It could be the experience of working with you, how you approach a problem or something special about how your solution works. While it doesn't have to become a slogan or tagline, try and make it short enough to be one.

Imagine your ideal consumer is on the other side of the Grand Canyon and in a barely audible question yelled at the top of their lungs, asks, **"WHY ARE YOU BETTER?"** or **"WHY SHOULD I SPEND MY MONEY WITH YOU?"**

What would you yell back? Yeah, keep it that short.

If it's difficult to plainly state what your USP is, it may be time to do some soul-searching and reevaluate your position.

Strong USPs are simple, memorable one-liners with a specific and desirable stated benefit.

Here's our
example



Our Unique Selling Proposition (USP)

We create smarter ways for your business to grow.



Other Stellar Examples of USPs

There's a better way to grow. – [HubSpot](#)

The new standard in online payments. – [Stripe](#)

The easiest way to manage team projects and tasks. – [Asana](#)

The leader in website design. – [Squarespace](#)

Emotional Selling Proposition (ESP)

How do you make your customers feel, in one word?
Unlike a USP which focuses on a unique benefit, your ESP should define the feeling, emotion or imagery you provide to consumers.

Now you don't necessarily have to put this on a bumper sticker and use it like a slogan. It doesn't even need to be a full sentence. No matter how you use it or what it looks like, carefully consider and understand the emotional benefit you're selling.

The Many Faces of ESPs



Happiness

Disney
Coca-Cola

Freedom

Harley Davidson
Las Vegas
Slack

Desire

BMW
Fragrances

Relief

Allstate
Walmart
Dollar Shave Club
State Farm

Creativity

Vans
Apple

Connection

iPhone (Apple)
Drift
Salesforce

Our Emotional Selling Proposition (ESP)

Confidence & momentum



Here's our example



“You’ve got me feelin’ emotions.”
- Mariah Carey



Taglines

What current, potential or past taglines might still attract or motivate the target audience to use your service? If you don't currently have any, try brainstorming three different angles.

Here are some of ours:

Grow Smarter.

Break the endless agency cycle by fixing the process.

We help you to deliver on your promises. (Not just make them louder.)

We don't knock silos down, we build bridges.

Growth takes more than moving a metric.

We create smarter ways for your business to grow.

Brand Story

An authentic, original story that explains the “why” behind your brand, the reason you really do what you do and the impact it makes, is priceless. Your goal here is to create a narrative that can be woven into all of your communications and adapted to be used everywhere you need it — from conversations on a tradeshow floor to Instagram (and beyond).

In the realm of brand identity elements, your brand story is close to the top of the priority list. What you focus on and how you say it can set the tone for your messaging and a marketing direction that feels authentic to who you are as a brand.

The Elevator

The elevator pitch of your brand story is the hard-sell cocktail party answer of what you do in a why/what/result format. Simple. Use this three-part formula to make it easy and include the most essential elements.

Why

Why do you exist? Why did you go into business? Why you, what’s your motivation? Why do this specifically?

What

What’s your product, service or offering?

Outcome

The customer’s outcome as a result of your product or service, a value proposition.

Here’s our example

Our Elevator Pitch

We help companies achieve smarter growth with brand, marketing, sales and customer experiences that align strategy with operations.



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The Signature

“A signature story is an intriguing, authentic, involving narrative with a strategic message that clarifies or enhances the brand, the customer relationship, the organization, and/or the business strategy. It is a strategic asset that enables growth, provides inspiration and offers guidance both internally and externally over an extended period of time.”

- Aaker and Aaker, 2016

The Signature

This longer brand story establishes an emotional connection by helping consumers to identify your brand by explaining why you exist and what you stand for in a captivating narrative. By writing one, you're creating a long-term asset that can be the foundation for your strategic messaging both internally and externally, providing direction and inspiration.

What this looks like can vary wildly and take on just about any imaginable format.

So rather than a template, here's some guidance for creating yours:

-  ***Tell a real story or stories***
-  ***Stay conversational and driven by your brand's personality***
-  ***Include your earliest business origins***
-  ***Include any other important origin details including your brand name, logo design inspiration or other brand elements***
-  ***Include your "why"***
-  ***Identify and solve the customer's pain points***
-  ***Differentiate yourself***
-  ***Be real and authentic***
-  ***Be specific and detailed***
-  ***NO JARGON***

Fun alternative:

Consider using the buyer as the main character, describing the after-experience of your product or service. Find the emotion in their pain point and connect first, by promising the end state then explaining how you'll get them there.

Use these questions to get started:

- ★ *What were the very first origins of your brand?*
- ★ *What's the origin of your brand name?*
- ★ *How did it evolve from an idea to where you are today?*
- ★ *What stories happened along the way that shaped your journey?*
- ★ *How would your brand speak and tell the story if it were personified?*
- ★ *What important milestones should be included?*
- ★ *Has your focus ever changed? How and why?*
- ★ *What do you want people to remember about the legacy of this company and its history?*
- ★ *What role has your brand played in the world, the industry and society?*
- ★ *What stories or testimonials from consumers will always stay with you? Have any impacted your business?*
- ★ *Who's the hero of your brand story?*
- ★ *Throughout the life of the brand, what has defined you or stayed constant?*
- ★ *Are there any customer stories or accomplishments that stand out to you as reflecting who your brand is or what you're capable of?*
- ★ *Do you have any examples or stories of team members or moments that embodied your core values?*



Our Signature Story

At **Impulse Creative**, everything we do is for one reason:

To help companies grow smarter

**By designing frictionless customer experiences
and the operations that power them.**



Read our Signature Story
on the next page

A black curved arrow pointing from the text towards the right side of the page.

A business walks into an agency for a shiny new fix.

Maybe it's tech. Maybe it's a new website. Maybe it's a new marketing campaign.

Like any good agency, they provide exactly what you asked for. Great.

Except, it's not making a very big difference. So you give it time, testing and tweaking until it's working to its full potential.

But it's still not having a major impact on your bottom line. And now some other metrics are off.

So you move onto the next shiny idea. Or, you start all over again with a new agency, and the cycle begins again.

Break the Cycle by Fixing the Process

The truth is: one new technology, tool or strategy won't help you to grow.

That well-oiled customer experience you want is actually a lot of different components spanning marketing, sales and customer service, working in synergy with the operations that power them.

It's why we use the wide-angle lens of **revenue operations** to see the buyer's journey (and beyond) as a whole. Then, we focus on making processes and collaboration better across your internal operations, in order to **create an awesome, frictionless experience** for the customer.

From a single form to access all of your content, to dashboards linking the critical data of your marketing and sales team at a single glance, we remove friction and create the synergy that **enables growth**.

Brand Mantra

This single, powerful sentence encapsulates the core characteristic of your brand and expresses it in a simple, clear way.

With a very specific template, this one seems easier than it actually is. In as little as three words, you can get to the core of who your brand is. The trick is narrowing it down to three words.

Deceptively Easy Template

[EMOTIONAL MODIFIER], [DESCRIPTIVE MODIFIER], [FUNCTION]

Start with the driving emotion of what you do, then add a descriptive adjective that narrows down your focus and end with a broad noun that best describes the main function of your company.

Examples:

Disney's mantra Fun [emotional modifier] family [descriptive modifier] entertainment [function]

Nike's mantra Authentic [emotional modifier] athletic [descriptive modifier] performance [function]

BMW's mantra [emotional modifier] Ultimate [descriptive modifier] driving machine [function]

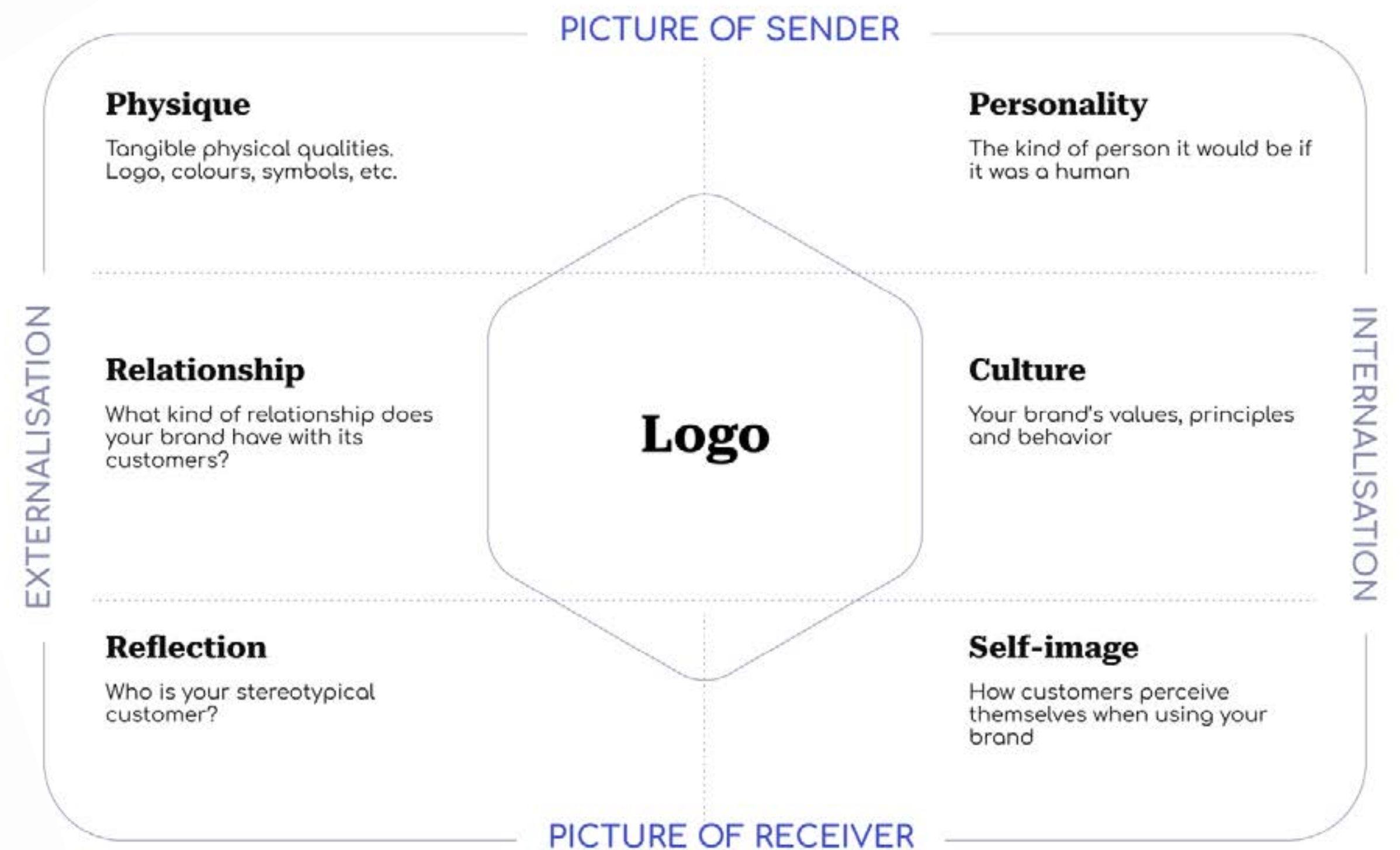


Brand Identity Prism

This famous representation of a brand is a prism consisting of six key brand attributes: physical elements, personality, culture, relationship, reflection and self-image. A brand prism can show you if your internal and external identities are in sync, and where there may be opportunities for refining.

Go through each section, jotting down whatever comes to mind, using the breakdown below as a guide. Some attributes, like culture, can be considered from a few different angles.

Kapferer Brand Identity Prism



Physical Elements

The general impression consumers have of the physical characteristics, iconography and all the visual elements associated with your brand (photography, logo, colors, products, packaging, etc.).

Ex. Orange and Pink - Illustrated graphics and design - Logo - Bold

Relationship

The role consumers think you want to play in their lives and the characteristics of that relationship. Are you an educator and guide? A trusted friend? The ambassador to luxury? A conduit for success?

Ex. A coach - A mechanic for your operations - diagnosing and tuning - A consultant - A trusted friend

Reflection

The basic description of the ideal consumer or target buyer persona. Nothing too deep here, just the general target persona as consumers see it.

Ex. Business gathering momentum - They have a vision, on their way, moving in a direction with a concept people have bought into already - Coming of age, maturing

Personality

The character and personified traits of your brand, from an internal perspective. From the way you act to your tone of voice, if your brand was a person, how would you describe them?

Ex. Confident but not pretentious - Fun - Spunky: energetic, courageous and determined - Bold - Smart - Driven by empathy for our clients - Deeply inquisitive

Culture

This broad brush category should include the internal beliefs, values and culture on which your brand's behavior is based. Include things that are so important that they're a part of your brand DNA, what powers your mission and what you promote.

Ex. Innovation - Strategic alignment - Operational mindset - Smarter growth - Bright - Always striving to improve - Both the microscope and the telescope

Self-Image

Your take on the aspirational identity of the ideal buyer persona, how you believe customers see (or want to see) themselves after using your product or service.

Ex. In control - Master of their operations - Reaching new heights



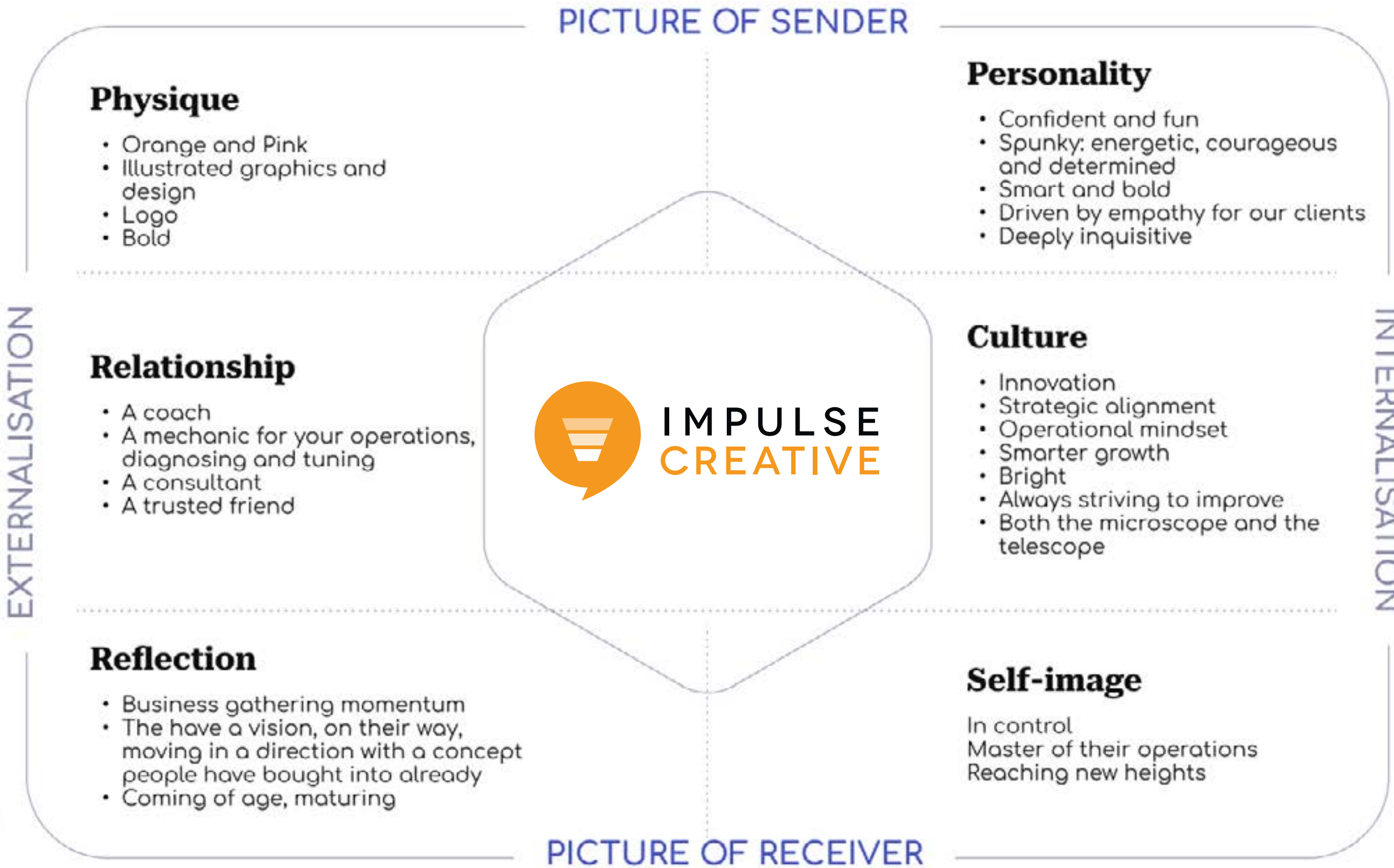
Brand Identity Prism

Once you've got this graphic completed, take a good, hard look at it. Every part should fit together logically. If something isn't harmonizing with everything else, it's a good idea to think about why and reassess your strategy in that area of your branding.

When your prism feels good and promotes a solid, completely aligned strategy, use the graphic to guide your communications, decisions and strategy, keeping it updated with your changing goals.

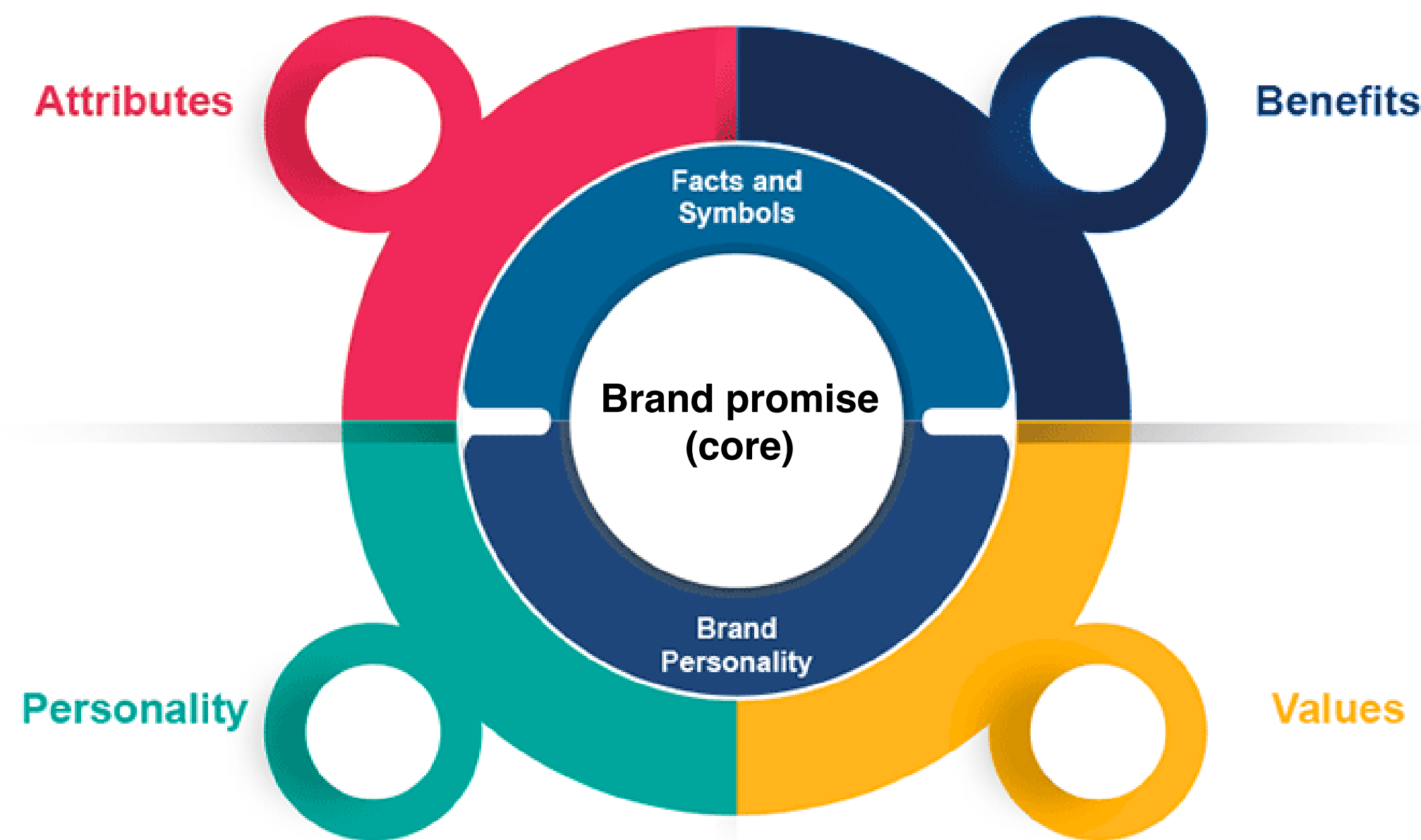
The Impulse Creative Brand Prism

Our Brand Identity Prism



Here's our example

Brand Essence Wheel



A different take on a strategic brand visual is a brand essence wheel. This graphic is a little simpler than the brand identity prism, but would be pretty redundant if you used both. We recommend you use just one or the other for your company's brand.

The brand prism is a better choice to assess how every element of your internal and external branding aligns, while the brand essence wheel is easier to grasp and use as a reference, especially for non-marketing folks.

Whichever you choose, supplement it with additional brand essence wheels for sub-brands, products and services. Think of these like a cheatsheet for at-a-glance guidance to keep creatives and marketers on-brand.

Use internal insights, interviews and consumer surveys to gather the straightforward information you'll need to complete this graphic template.



Impulse Creative Learning Ops Services Brand Essence



What the product does for the user

Enable and empower customer to leverage the most of HubSpot

Provide on-demand and live trainings to HubSpot users and website clients

Present trending information about HubSpot product, information and releases



How the brand makes buyers look

Competent, Professional

Tactical and skilled



How users describe the product

This is great!

Thorough, Interactive

Organized, Responsive



How the brand makes users feel

Ready, Confident

Smart and capable

Aligned



Brand personality

Light-hearted

Loud/enthusiastic/energetic

Characters, full of personality



Facts and symbols

HubSpot

Dashboard

Video-based

Here's our example



Our Core Brand Promise

Grow smarter and maximize your investment by getting the most out of/maximizing the HubSpot platform.



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“They don't know who we be.”
- DMX



Brand Positioning

You can't determine where your brand is going until you really understand where you stand now, in your industry and in the minds of consumers.

Brand Positioning

Brand positioning defines your place in your industry and in the thoughts of buyers to establish the best possible strategy for making your company appeal to target consumers.

On the consumer strategy side of this goal, the tools and exercises in this section will help you to establish brand appeal and loyalty on an emotional level, based on shared values, beliefs, practices and data. On the industry strategy side, you'll better understand where you stand amongst your competition, what's driving your success and where there are opportunities.

A successful brand positioning strategy defines your unique place in your industry and in the lives of consumers, by establishing a powerful mindset to guide the strategy and growth of your entire organization, based on the metrics that matter.

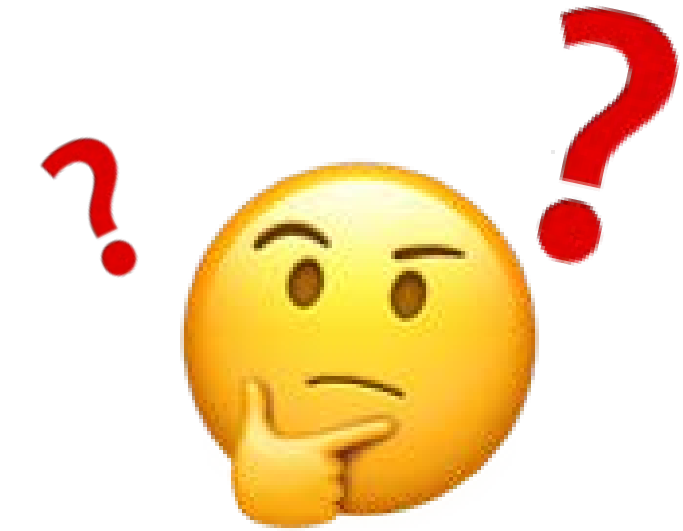
Know where you belong.



Positioning Statement

In one simple statement you're narrating the journey of a specific persona and **how you solve their problem**. They guide your strategy, marketing, design, business direction — everything. Anyone in your organization should be able to read your positioning statements and confidently know whether or not your marketing is aligned with your brand.

Follow this templated format to create as many positioning statements as you need for your major personas and products or services:



To	[target market]
We are a	[industry or category]
That provides	[differentiated benefit]
So that you feel	[emotional selling proposition (<u>ESP</u>)]
That's because unlike	[competition/industry segment]
We have/are/do	[unique selling proposition (<u>USP</u>) or the proof of your brand benefit]

Let's break this down...

Target Market is the specific market share you're after. Please be specific. We're not going to get very far if all of your branding is marketing for everyone.

Category is your broad industry (SaaS, finance, consumer goods, construction, etc.).

Differentiated benefit is what you provide consumers and what sets it apart.

ESP or emotional selling point is the feeling, emotion or imagery you provide to consumers.

USP or unique selling point is the most important thing that makes you different from your competition and the best possible solution for the buyer's problem.

Our Positioning Statement

To (established) companies that want to grow (intentionally), we are an agency that provides smarter growth strategies so you feel confident. That's because unlike other agencies, we create smarter ways for your business to grow, gain momentum and move forward with an operations mindset.



Here's our example

Aspirational Brands

Start by thinking about any brands you admire, or those with characteristics and attributes you aspire to emulate. Who's the best-of-the-best in your industry, with **bold branding and a strong strategy** that takes them everywhere they want to go?

List any brands (in or outside of your industry) with traits or strategies you admire. Even if you don't want to replicate exactly what they do (and you probably shouldn't), this exercise is about learning what speaks to you and beginning to explore what success looks like for you.

With each name you jot down, explain why. What do you like so much about them? What makes them different from you? What makes them special and how do they do it? How could you replicate that success or strategy in your own way?

Competitors

List your top three to 10 direct competitors. Include what you have in common and what makes you different. Then rank them from the most similar to you (1) to the most different (10).

Data-driven Deep Dive

Use SEO tools and a critical review of their marketing to analyze how you stand against your top three to five competitors.



What keywords are you competing for?

Who's ranking better?

What are they doing better than you?

How much content are they producing?

What types of content are they producing?

What stages of the buyer's effort are their efforts most targeted toward?

What conversion opportunities are they offering?

What's their social media presence like? Are those channels updated frequently?

How fresh is their website?

How's their presence on mobile?

What's the user experience like?

Do they employ modern marketing and sales tools such as chatbots?

Is their branding stronger than yours? How?

Are they targeting the same consumer as you? Are they doing a better job at it?

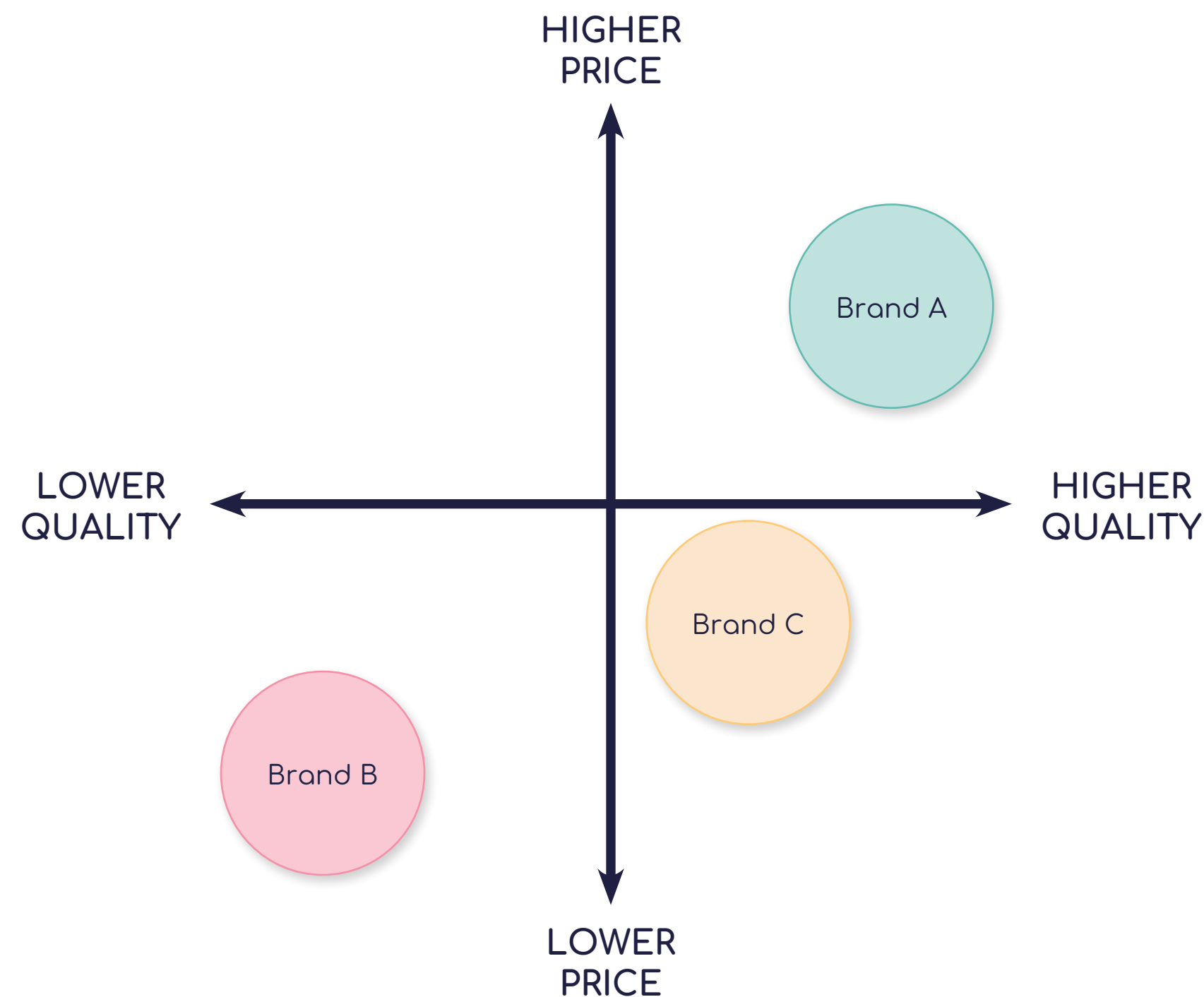
Competitive Advantages

How is your company/service better than your competition? Go on and brag about what you're doing right. List everything you can think of. Then pat yourself on the back.

Perceptual Maps

How do you stack up? Stop guessing and find out.

A big part of understanding your positioning is to assess your brand and competition, looking for important insights. Using the data gathered from your consumers using an insight survey (see below), plot these easy-to-understand graphs using between two and four vectors that represent factors of buyer consideration you want to compare.



Perceptual Map of Price vs Quality

Ask lots of questions in your surveys so you have a lot of vectors to compare price/quality, taste/nutrition, ease of use/features, etc. Focus on whatever contrasting attributes buyers may use to compare you to the competition.

To compare even more factors, create multiple perceptual maps. Or, for the proud data geeks in the crowd, take a crack at the [Harvard Business Review's Centrality-Distinctiveness map](#), a way to visually identify broad-scale strategic opportunities with the same basic concept.

Customer Insight Surveys for Quantitative Data

Unlike your brand identity and messaging, brand positioning strategy relies on both qualitative and quantitative data and research. The best way to collect the raw data is by surveying your buyers.

Customer surveys don't need to be a complex endeavor. [Modern survey tools](#) like [SurveyMonkey](#) make it easy (and often free) to customize a wide range of question types, provide customers with a simple link and examine the collected data. Who you send these surveys to, how many customers you include and the data you're collecting will depend largely on the kind of business you represent.

For example, an international B2C manufacturer of goods will likely need a much larger, varied sample size than a niche B2B SaaS brand. [Calculators like this one](#) can help you to determine how many of your customers/potential buyers you should survey for a reliable sample size, and what degree of accuracy a survey that size will reflect.

Include a range of questions that cover competitive comparisons and the perceptual map factors you'll want to measure.

Download our nifty free template to get started: [Brand Engine Consumer Insight Survey Template](#)

Pro Tip:

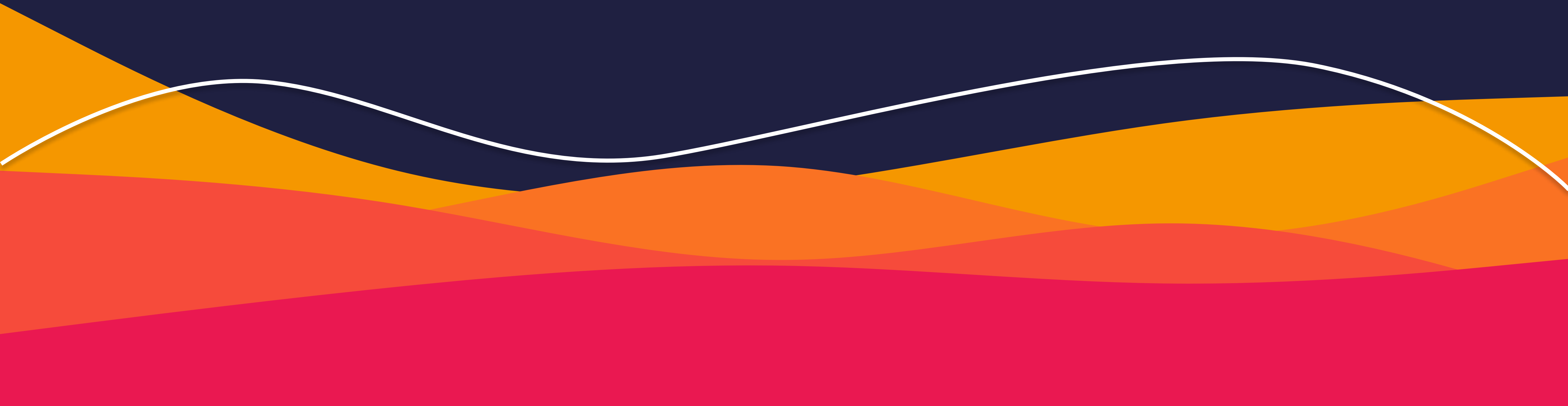
To increase your response rate, consider offering a small Amazon gift card as a reward for completing your survey. Even \$10 will do wonders to motivate your audience and each can be administered with another simple link.



“So, tell me what you want, what you really, really want.”
- *The Spice Girls*



Brand Messaging



Brand Messaging

Maybe it begins with a tagline.

But your brand messaging has to become so much more than that. The voices of the brands in our lives were created with intricate, 360-degree planning. It takes an army of writers, designers and marketers to push **a unified voice and style** out into the world everyday. A **brand manual** is how they do it so damn well.

This section will help you to create the operator's manual of your brand message, with tangible instructions that explain exactly who you are and how you want to interact with the world. It is a blueprint of your identity-in-action, your tone of voice and your personality, all in a live, evolving document that says exactly who you are, for anyone that needs to know.

This section is one of the most overlooked details in the branding of companies around the world. However, when you stop to notice consistently awesome cross-platform branding, you can bet your ass they didn't skip messaging.

Words are assets, just like your design. A lot of thought should be put into using tone and words correctly and "on-brand." Far more people are entrusted to speak or write on behalf of your company than to design for it. And due to the nature of writing, those people are probably not all going to be professional writers. Arm them with **tools to recreate your brand voice**, everywhere they need to.

Even a few pages of guidelines, shared amongst your staff, will bring a cohesive voice to your company, strengthen your brand and help **build the trust of your audience**. With a little planning, your whole organization can sound like a professional brand writer behind every word.

The following suggested sections can be as long or short as you need, just say everything you need to say. What would you need to tell another person about how to speak for your company if you weren't there?

It's that simple.

Assess Your Messaging

Describe the state of your messaging now, then reflect a little on how it's evolved over time. Ask yourself the following questions:

What do you like about it?

What don't you like about it?

What are your current challenges?

Based on your current positioning and brand identity, what's the right strategy for your messaging and what does that change entail?

Evaluate your assessment. Even though you may have had an idea of how your messaging needs to change, take this time to crystalize it.



Buyer Personas

Before you can write any messaging, you should have a solid grasp on who you're talking to. That's where your buyer personas come in. Buyer personas are a cornerstone of your inbound marketing. These fictional representations of your customers will teach you who you're selling to and how to do it best.

If you don't already have these, [hop over here](#) to HubSpot's Make My Persona tool and create them.

Then, list all of your buyer personas so they have a place in your ever-growing brand manual and can be quickly found or referenced.

Example:

Persona #1:

Business Betty



Age range:

Gender:

Education level:

Industry:

Size of organization:

Job title:

How their job performance is measured:

Who do they report to:

Goals and objectives:

Biggest challenges:

Job responsibilities:

Tools so they use or need to do their job:

How prefer to communicate with businesses and vendors:

Social networks do they belong to:

Industry Messaging Trends and Marketplace Analysis

Take some time to review the messaging of your top competitors, the leaders of your industry and your aspirational brands from above. Go beyond their home page. Look at their about page, a service or product page, their blog content and at their most active social media channels.

Assess what you see using the following questions:

*Can you identify a clear, consistent tone of voice?
Describe it.*

How does their messaging differ from yours?

Is it effective? Why?

Example:

As you go into the next section and begin developing the details of your own tone of voice, be mindful of the key insights from this exercise.

Steal what works and be wary of what doesn't. Make sure your messaging fits in with these folks while also standing out and being authentic. Even if you're not a professional marketer or writer, as a consumer and industry professional, you can trust your gut.

Brand Voice Strategy

Use this section to describe your ideal tone of voice with a detailed, bulleted strategy for writing in that style. Just as designers provide incorrect usages of a brand logo in a graphic standards guide, give examples of specific language you would and wouldn't use. Even providing a link to another website, with a tone of voice you like, is helpful.

Considerations include:

What kind of emotion do you want to elicit?

What's the best response for messaging when your consumers are experiencing negative emotions, such as finding an error page?

How can your culture translate into your voice?

Is this a voice your buyer personas would like and respect?

What is your preferred point of view? (first person, second person, or third person)

How do you want to phrase your calls to action?

Can writers use slang or cliches?

Use the **Impulse Creative Brand Voice Strategy** for inspiration:

The Basics:

- Happy, Human, Helpful, Smart
- Write in a positive tone
- Spin shock value titles to be positive, not scary
- Never talk down to the reader, we're on the same team
- We're fun, helpful humans that are excited to share valuable information.

Keep our content consumable and interesting with:

- Bullets and lists
- Pull/block quotes
- Pro tips
- Facts and stats
- Our vision and insights or having a position that grounds what we're saying

Stay conversational and human with:

- Humor
- Fun
- Metaphors

Aim for these emotions:

- Excitement
- Empowerment
- Curious
- Educated confidence
- Expertise

Other elements of our culture for your voice:

- Be impactful and positive
- Purposeful (there's always a method to our madness)
- Approachable and human
- Together for growth
- Supportive

When our clients are experiencing negative emotions:

Use empathy and humor to mitigate a bad experience. (Ex. Like stumbling upon an error page)

Potty Mouths and Slang:

We're grownups and know how to responsibly write on the edge. But If you're second guessing yourself, here's some tips:

- Trendy language should be tasteful and easily understood in context.
- Little league swears are OK if you're using them in a positive context.

OK: We kick ass at writing the best shit in the marketing world.

NOT OK: That guy is an ass and I don't give a shit.

- Big league swear words are never OK. Find a little league way to say it:

F bomb, f word, WTF

Never, ever, ever use racial slang or sexual references. Sexy stuff has no place in our work and racial slang has no place anywhere.

Religion:

Our clients and team members have lots of different beliefs. We respect that by never referencing anything with a religious connotation.

Politics:

Just don't. Ever. Anywhere.

We ❤️ Emojis:

- When it feels right, use them in blogs, emails, etc. to show your fun, human side
- Works as a tool to respond to social media comments
- Use depends on your audience, think about your content's buyer persona
- Use yellow color skin emojis to avoid racially-tied different tones. Impulse is a brand, not a person, and we represent everyone.
- If you're going to use emojis, stay aware of emoji culture and fully understand all of the connotations your emojis may represent.
- Use good judgement and make your emoji use responsible and intentional.

Text acronyms:

These can help humanize us and appeal to our readers but use with discretion and with your medium or target audience in mind.

- Ex. OG, LOL, ROFL

Here's our example

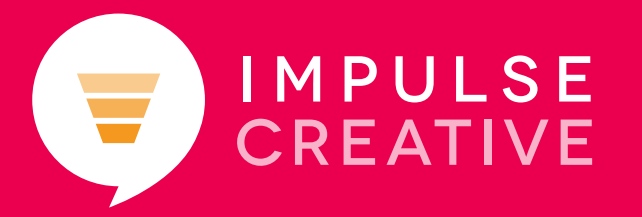
Brand Personified Exercise

A good exercise for starting this section is to imagine your brand as a living, breathing person that walks into the room where you are. Figure out how they would act and sound by going through all of these character-establishing attributes that will help you discover your tone of voice. They may not all be directly used for tone of voice creation, but they'll help you to discover what that voice should be. Then, when you're writing, put yourself in their shoes and try to emulate what they would sound like.

There are no wrong answers here. Just get your team together, or pass this around, and have fun scribbling down the thoughts of the group.

Impulse Creative Personified

- Age:** 40ish
- Education:** Some college but always learning
- Mood:** Confident, strong, excited
- Career:** Inform and educate, get shit done, sell something, problem-solvers
- Family:** 2.5 kids, picket fence, but hard worker trying to find a balance between work and home to have it all
- Like:** Networking, engaging, new challenges
- Dislike:** Doesn't like wasting the little time they have, inauthenticity
- Humor:** Smart, charming, knows when to joke but knows when to be serious
- Entertainment:** Audible, podcasts, content we can consume fast



Channel or Persona Variations

Does your ideal voice change for different marketing channels or buyer personas? What exactly should that look like?

Example:



Impulse Blog Messaging

Tone of Voice:

- Be social on social media
- More relaxed
- Really human
- Be real
- Be inspirational, not promotional

Use Why, How, What format to organize your content (where applicable)

Headlines:

- H1 is centered
- H2, H3, Etc. is left aligned

Headline Size:

- 2-3 times larger than text

Subheads:

- Yes please!
- Often

Headline Capitalization:

- Major word capitalization style
- Example: How to Write Good Headlines that People will Read

Write for our Buyer Personas

Product/Service-Specific Messaging Strategies

Add any detailed strategy or direction you need for writing about your specific products or services. Sub brands and different teams will often have their own brand voice strategies and slightly different guidelines that appeal to their varied audiences.

Pro Advice on Creating an Authentic Tone of Voice

Steal

Find voices you love and steal the essence of what makes them great.

Break the Rules

There is absolutely no reason to just fall in line with what everyone else is doing. Be authentic. Sure you want to fit in with your industry, but you need to stand out as well.

Take Risks

Taking a risk with your tone of voice can lead to big rewards. You may turn someone off, but you'll also gain a loyal pack of followers.

Make Yourself Happy

If your content can make you laugh, smile or feel something, there's a great chance the world will feel those emotions too. Be your own gauge of impact.

Brand Vocabulary

Every industry, and even certain businesses, has insider lingo and words that don't exist outside the realm of what you do. Purposely **branded language can play a pivotal role** in a marketing strategy but it's a fine line. Don't let your language become a stumbling block for potential buyers — that's jargon. Identify and define your brand's vocabulary and relevant industry jargon, including usage guidelines when applicable.

Examples we use at **Impulse Creative**

- **Refer to customers as:**
 - **Clients** are people we serve
 - **Partners** serve us (hubspot, etc.)
- **When referencing technology**, even Google, say "a tool like XXXX" instead of just referring to X.
 - **Keep this in mind with our tech partners** (such as Hubspot) to ensure we aren't exclusively using that tech.
 - **Make sure people know** that the technology is just a platform to deliver a result.
- **All references to wayfinding growth podcast** need to be referenced as "Wayfinding Growth Podcast".
- **KPI:** Key Performance Indicator
- **OKR:** Objective & Key Result
- **PPC:** Pay-per-click advertising
- **CTA:** Call to Action or clickable statement that inspires a next step.
- **SQL:** Sales Qualified Leads
- **MQL:** Marketing Qualified Leads
- **CQL:** Chat Qualified Leads
- **Funnel:** The inbound funnel journey from
- **Tofu:** Top-of-the-inbound-marketing-funnel
- **Mofu:** Middle-of-the-inbound-marketing-funnel
- **Bofu:** Bottom-of-the-inbound-marketing-funnel
- **Doc:** Microsoft word document
- **GDoc:** Google Document
- **PDF:** Adobe formatted doc
- **Screen grab:** Photo of your screen
- **CMS:** Content management system
- **CRM:** Customer Relationship Management

Copy Rules

Now that you've got your tone of voice laid out, use this section to make key points about the nitty-gritty details of writing your content. This can be as long and comprehensive as you need it to be.

If you're a small business with occasional blog posts and a basic Facebook page, just jot down whatever comes to mind. Large businesses that are churning out content on all kinds of platforms will need to get very detailed.

Preferred Style Manual

Most people haven't thought about the Chicago Manual of Style, Associated Press Stylebook (AP) or The Modern Language Association (MLA) Handbook since college term papers. There isn't a big name grammar guide exclusively for websites, so everyone still relies on mainly these three for direction.

Simply pick one and make it accessible to writers via a paid subscription or paper copy to look up: the usage of words, hyphens, new tech terms, which numbers get spelled out, where commas go, etc. You'll be a lot more grammatically consistent than anyone relying solely on Google.

If you're really into making trivial decisions, here's a full listing of style guides to choose from. A good general rule is to let your writers decide, if you don't personally have a preference. (AP is always our recommendation to clients.)

(Pro Tip: AP does not typically use the Oxford comma/serial comma, Chicago Manual of Style does.)



Capitalization

List what words should writers always capitalize. Can staff use caps to emphasize an IMPORTANT POINT?

Should headlines be sentence casing (first letter of first word and then proper nouns only), all capital letters or use major word casing (simplified, it's the first letter of all words longer than 3 letters)?

Do's and Don'ts

This is exactly what it sounds like, a specific list of what to say or not say, if you need it. It's a great place to speak out against pet peeves.

Is it ever OK to abbreviate your business name? How should people refer to your customers? As clients, as family or as "the (insert-brand-name-here) nation?" Do certain words overdeliver on your brand promise? Or have you decided to never use certain words or modifiers to refer to your product? (Like saying "an iPhone smartphone").

The best strategy for this section is to just keep your brand guide in an open tab for a while and throw new notes in it whenever something comes to mind.



Terms and Brand Words - Definitions and Usage

Use this section to keep bulleted lists of brand words or vocabulary and guidelines for their usage that will be helpful to anyone writing content on your behalf.

Legalese

Lots of industries have legal considerations for everything they say to the public. It's illegal to misrepresent yourself or overpromise. One use of this section is to clearly outline what cannot legally be said about your product or service.

Industry Jargon

Other helpful content here includes the use of industry-specific terms, language or words your company has chosen to never use and a quick-guide of definitions for company services or terms that need a bit of explaining. If your writers don't understand what they're saying, no one else will either.

Considerations for Kids

If your company sells goods or services used by children, you'll have a lot to add here including COPPA, CARU and FTC compliance guidelines. Any other highly regulated industries will also have their own set of rules you'll need to add.

Licensing

When your business works with the licensed properties of other companies, have writers add all of those licensing rules (and in-copy changes made by legal approval) here to save time and money on rewrites and content approval chains. In our experience, this section can turn into a 50+ page addendum for some legal properties.



Trademarks and Copyrights

Does your company have any trademarks or registered names that need to be marked with a ™ or ® when they appear in print or on the web?

Be proactive with legal trademarks and registered terms. Jot down the terms that need special treatment, superscript, or legal annotation, and when.

Get clarification from your lawyer/legal document, but most terms only require a ® or ™ on the first mention per page (digital or print) or the first mention per change in type size (Ex. once in headlines and once in normal text).

Pro Tip: Include keyboard shortcuts for legal symbols for MAC and PC



Example

General Copy Rules

- Before a bulleted list, use a colon: not an emdash —
- Break up your content visually by using a blank line before the bulleted list and after the sentence
- Don't use an emdash — in place of a comma
- e-book
- Chatbot is one word
- Call to action (no hyphens)
- Versus not vs or any other form

Preferred Style Manual

- Associated Press Stylebook (AP) That means no Oxford comma (usually).

Point of View:

- We trend toward second person for educational
- Website sticks to second person
- Blog is flexible

Capitalization

- Use all caps sparingly and never for a whole sentence.

Acronyms:

- Text acronyms are fine, especially on social.
- Only use WTF in a positive connotation.
- Abbreviations should be referenced with the whole name first and acronym in parentheses, then use the acronym.

Punctuation:

- Use exclamation points sparingly.
- No more than 2 side by side.

Second-Person Pronouns:

- If you can, use they instead of a singular he or she
- Don't use he/she
- They is ok for singular use when you don't want to be gender specific

Active Voice

- Subject of the sentence should perform the action, not receive the action.

Right: I wrote a blog.

Wrong: The blog was written by me.

Capitalization

- For headlines, use major word casing (simplified, it's the first letter of all words longer than 3 letters unless it's "You")

Do's and Don'ts

DON'T abbreviate our business name

DON'T guarantee any specific results

DON'T make the client feel like a number

DO Use keywords in your headlines

DO provide links when you're making a reference

DO end on a call to action

DON'T abbreviate/shorten Impulse Creative or Wayfinding Growth Podcast



“A little less conversation, a little more action, please.”

- Elvis Presley





Now What?

Starting your brand engine.



The three main sections of this guide are meant to give your business a solid foundation for your operationalizing branding strategy. It's the exact same template we use at Impulse Creative for clients. But you can't just stop here and expect the branding work to magically do itself.

Share your brand guide with your team in a living document that's added to and maintained often. Anyone that writes or edits on your behalf should have it bookmarked. Make it a part of your onboarding process as well. Even if there are only a few people frequently using your brand guide, what you've determined and decided here are important concepts for your whole company to understand.

While this guide can help you to establish your brand's identity, positioning and messaging, you'll still need to put it all into practice. A professional brand audit can help you to identify opportunities to strengthen your brand awareness or understanding, your positioning and your messaging.

Our team helps brands to strategically examine their brand, from SEO metrics to the wording of your communications (and beyond) to help you create a strong strategy consistent with your brand guide and aligned with your goals.

Didn't make it through the whole guide? We can help with that too, with hands-on assistance for every part of your branding journey.

As a rev-ops agency, Impulse Creative takes a strategy-first, data-backed approach to branding. Our branding experts do the classic work of helping your team to create unique brand elements. Then we go way further, by helping you to weave your brand elements across your organization for an operationalized brand strategy that can be measured, monitored and calibrated to achieve your revenue goals.

By getting this far, you're off to an incredible start. But don't stop until that **perfect brand strategy** is a real, measurable part of your revenue operations engine.

[Book a Meeting →](#)



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