

Branding Worksheet for Consultants

Fill out this worksheet as completely as you can. Once you've completed it, ask a few clients if it matches their perceptions. The final worksheet will contain words and messages to help you build a strong brand for your business.

YOUR IDENTITY

- **Business and personal goals:** What do you hope to achieve in the next 1-3 years? The next 3-5? How does this mesh with your personal goals?
- **Core values and beliefs:** Why did you start your business? What's important to you about the way you conduct your business?

YOUR BUSINESS

- **WHAT is your business category?** WHAT type of service(s) do you sell? (Use your elevator speech – be brief.)
- **WHO are you?** What is your background? Do you have any special degrees or certifications? Do you have any previous experiences you want to mention to potential clients?
- **WHERE is your business based?** Where are your target clients based?
- **HOW do you provide your services?** Do you use a specific technique, methodology, or approach? Is it a well-known approach, or does it need to be explained?
- **WHEN did you start your business?**

YOUR NICHE

Your Clients (Who are your current or target clients? If you serve more than one type of client, answer questions for each type.)

- **Client category and size:** What type of clients do you serve? Do you provide services for individuals, businesses, or both?
- **Who is the primary person** who decides whether to purchase your services? If it's an individual, what do most of your clients have in common (age, location, background needs)? If it's a business or nonprofit, what is their title or role in their organization? Is more than one person involved as an information-gatherer, influencer, or decision-maker?
- **Problems/needs/wants:** What are the problems or needs of the businesses or organizations in your market? How do you solve them? How does their interest in your product/service reflect their values? How do your services make your clients feel good?
- **Points of contact:** How do you come into contact or communicate with potential clients?
- **Summary:** In 1-2 sentences, summarize who your target clients are and how your services meet their needs.

YOUR COMPETITORS (List the top 3-5.)

What other consultants are in your category or niche? List the 3-5 that you're most likely to bid against for work.

- **Competitor #1:** How are you similar? How are you different? What do you do better than them?
- **Competitor #2:** How are you similar? How are you different? What do you do better than them?
- **Competitor #3:** How are you similar? How are you different? What do you do better than them?
- **Summary:** In 1-2 sentences, summarize how you're different or better than your competitors.

YOUR IMAGE (how you want to be perceived)

Brand Personality: If your business was a person, which 3-5 adjectives would you want your client to use to describe you? (If you don't know what they'd say, ask them.)

1.

2.

3.

Descriptor: (Optional.) A short phrase (3-8 words) that you can use with your name and logo to describe who you are or what you do. A descriptor is especially helpful if your name isn't self-explanatory. Can be used in addition to or instead of a tagline.

Longer descriptions: You may also want to add a few more words to your descriptor to create a 25-word, a 50-word, and a 100-word description that you can use on your website, social media, and anywhere you might need it.

- 25-word description
- 50-word description
- 100-word description

Tagline: (Optional.) A short, catch phrase that expresses the spirit or vision of how or why you do what you do.

Key messages. List the 3 most important concepts, facts, or statistics that you most want people to know or think about your business. What's special about you?

1.

2.

3.

PUTTING IT ALL TOGETHER

Once you've come up with the words you'll use to talk about your business, you can use them on everything, including your website, signage, and social media. You can also hand this worksheet to a graphic designer to develop a logo, a color palette, a typeface, and images that reflect your brand personality and values.

Everything that you (and the people you work with) do should consistently share the same attitude, look and feel.

Here are some of the items that you should review to make sure that they reflect your brand.

- Signage
- Product cards
- Postcards/Rack cards
- Website
- Social Media
- Emails
- Operations
- Customer service procedures