

Branding Worksheet for Small Business

Fill out this worksheet as completely as you can. Once you've completed it, ask a few trusted customers if it matches their perceptions. The final worksheet will contain the words and messages that will help you build a strong brand for your store, product, or service.

YOUR IDENTITY

- **Business 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 product(s) or service(s) do you sell? (Use your elevator speech – be brief.)
- **WHERE is your business based? Where are your products or services available?** How does the place where you're based affect how customers feel about your business?
- **WHO are you?** Do you or your business partners or employees have any relevant experience you want to feature
- **HOW do you offer your product or service?** Do you have a retail operation? Wholesale? Online or ecommerce? Do you use any specific techniques or methodology to produce or display your product or service?
- **WHEN did you start your business?**

YOUR NICHE

Your Customers (If you serve more than one type of customer, answer questions for each type.)

- **Demographics** – List everything you know about your customers, such as age, sex, race and cultural background, education, marital status, children living at home, zip codes. etc.
- **Problems/needs/wants:** Does your store, product or service solve a problem for your customers? How does buying/using your products or services make them feel good?
- **Points of contact:** How do you come into contact or communicate with them?
- **Summary:** Who are your customers and how does your product meet their needs? What's the best way to reach them?

YOUR COMPETITORS (List the top 3-5.)

- **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:** How are you different/better than your competitors?

YOUR IMAGE (How do you want to be perceived?)

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

1.

2.

3.

Descriptor. Find 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 is not self-explanatory. Can be used in addition to or instead of a tagline.

Longer description. 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.) Write down a few ideas for a short, catchy phrase or sentence that expresses the spirit or vision of what you do or how you do it. **Examples:** Apple: Think Different. Kashi: Seven whole grains on a mission. Campbell's Soup: Mmm good. Disney: Where Dreams Come True.

Key messages. List the 3 most important concepts, facts, or statistics that you most want people to know or think about your business. Are you a family business? Locally owned? 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 for your business, including your website, signage, and social media. You can hand this worksheet to your graphic designer to develop a logo, a color palette, a typeface, and images that reflect your brand personality and values.

Everything that you and your employees do should consistently share the same attitude, look and feel. Your customer service and operations can also help you build a strong brand.

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

- Signage
- Product cards
- Postcards/Rack cards
- Website
- Social Media
- Emails
- Operations
- Employee outfits or accessories
- Customer service