

The Essential Planning Guide for Companies Looking to Evolve With a Refresh or Rebrand.



Market Research | Brand Strategy | Thought Leadership | Brand Management
We builds brands that meaningfully connect with customers to accelerate business growth.



A Guide to Evolving Your Brand: A Planning Tool for a Brand Refresh or Rebrand

Companies that evolve their brand will gain a competitive advantage and reap the benefits of building positive customer relationships, improving loyalty and boosting top line growth.

Creating and maintaining a strong brand that is contemporary, relevant and connects with customers takes time and expertise, but if you don't plan to do so, know that your competitors will.

One of the brands we strategically repositioned provided the company with a platform for accelerating growth to become one of the fastest growing private companies in the U.S. Recently, they were purchased for just shy of \$100M.

Is it time to rebrand or refresh your brand?

You're thinking about evolving your brand, but you aren't sure you need to. If you answer "no" to any of the below questions, it's time to rebrand or refresh your brand!

- Is your brand staying current with the changing attitudes and behaviors of your customers?
- Can you clearly articulate how your brand is "special, better and different" from your competitors in a unique, compelling and defensible way?
- Can you effectively appeal to new market sectors, new customer groups or launch a completely new offering with your existing brand?
- Is the look, feel and tone of your brand current and modern? Is the digital presence mobile responsive?
- Do you have a brand story and supporting key messaging that effectively connects and engages with your key audience segments?
- Did you update your brand's positioning and story after a merger/ acquisition?

Committing to evolving a brand can be challenging, and isn't recommended for those who are looking for a quick fix or just creative changes to an ad template, a trade show booth or a website home page. Evolving your brand is an undertaking for those seeking to accelerate business growth — starting with crystalizing a clear brand vision. Those who have set aside the time and resources to support doing so will reap the rewards and competitive advantages.

We know change is exciting and often feels wrought with unknowns, but it is an investment that takes planning and strategic thinking — with a branding agency and its experienced team. It entails making informed and deliberate decisions based on data, as opposed to emotion-based decisions or opinions.

What's the difference between a rebrand and a brand refresh?



A rebrand is a complete overhaul

A rebrand is a complete overhaul that could entail repositioning the brand within the marketplace, as well as creating a new look and feel for the brand.

This could include a new name and most often a new identity (e.g.

logo, color palette, graphics, photography, etc.) that will act as a strategic guide and creative roadmap for the design of new marketing assets such as the website, collateral, sales enablement tools, and other foundational templates (e.g., ads, catalogues, PowerPoint, business cards and more).

A refresh leverages existing brand elements

A refresh leverages existing brand assets and elements, whether it is the name, color palette, logo or fonts.

Within these parameters it's possible to refine a brand's positioning, making it more competitive within a market, along with refreshing the brand's story. In this scenario it's also possible to evolve or modernize the look and feel of the brand. A refresh can help a brand become or stay relevant and better connect with its audience.

Refreshing the look and feel of your brand supports changing its perception. This sends a signal to the market that says, "Listen up, something is new and different with our company!"

Evolving your brand: four key steps and planning considerations

Evolving your brand entails taking a holistic look at the brand. It is *not* about creating an updated sales deck or website home page.

Companies should be prepared to take a strategic approach starting with identifying and discussing long-term objectives and goals for the brand.

Here are a few key considerations across four of the key steps:

STEP 1 | DISCOVERY

Gathering Intelligence to Inform Smart and Strategic Decisions

- Crystalize your brand’s long-term vision, mission and purpose. (Read more in our article, [“Purpose: Does Your Brand Need a Soul?”](#))
- Assess category trends and audit your competition (e.g., what are they communicating?)
- Identify the gaps that exist between the current state of your brand and its vision
- Create or refresh personas that reflect your ideal customers’ mindset and motivations
- Understand how your ideal customers identify solutions and make buying decisions



STEP 2 | STRATEGY

Creating the Roadmap for Sustainable Brand Success

Upon completing the Discovery step, it's time to articulate your brand strategy and create or refresh your foundational assets, such as finding your brand's WHY and telling a crisp and compelling Brand Story.

Some of the considerations you should be prepared to make at this stage include the following:

- Clearly state your brand's unique point of difference
- Evaluate your brand positioning against the competitive landscape. Where is your distinct brand opportunity?
- Create or finesse your brand narrative and key messaging (Read more in our post, [“Storytelling: What is Your Brand Story.”](#))

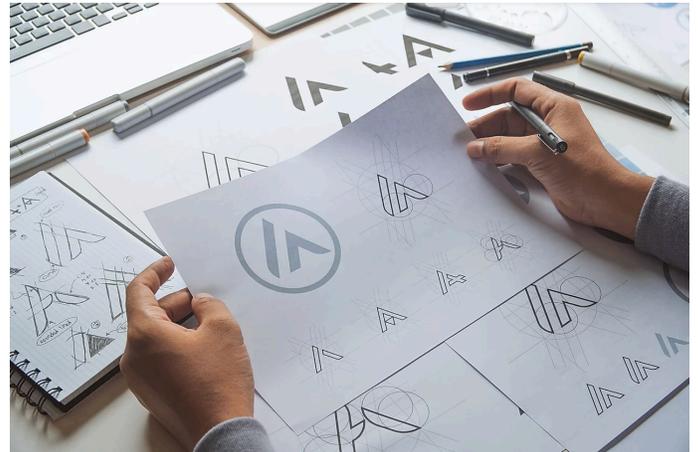
The look and feel of a brand's visual identity should align with the company's values, culture and mission.

STEP 3 | CREATIVE CONCEPTING

Identifying Potential Creative Directions Aligned with Strategy

Rebranding or refreshing the look and feel of your brand supports changing its perception. This sends a signal to the market that says, “Listen up, something is new and different with our company!” It also gains the attention of audiences that may not have been looking and listening to your brand prior to the new visual identity and brand story.

It's critical to understand that you will want to unveil your brand's new positioning and creative with the launch of an integrated campaign or at the minimum a significant customer touch point such as a new website. Of course, ideally, a brand would launch with refreshed communications such as templates for ads, catalogues, sales enablement tools, white papers, infographics, and pitch decks — to name a few. For example, we don't recommend rolling out a new creative look for your brand with a trade show booth and new materials only to have customers who visit your website find an older version that doesn't match the new visuals and messaging communicated at the booth. So what goes into the creative concepting phase? Below is a high-level checklist.



✓ Planning for creative concepting

The look and feel of a brand's visual identity should align with the company's values, culture and mission. It's important to establish upfront the creative vision, along with the dos and don'ts. Often this will entail a workshop to establish what a company's marketing team finds visually appealing and what it doesn't. Of course, looking at the creative produced within the category, specifically competitors, is an instrumental part of this phase.

✓ The brand brief

Regardless of where a brand is starting, it's important to begin with a holding a planning session, then proceed to writing a brand brief that reflects all the considerations, mandatories and constraints associated with the undertaking. An agency writes a brand brief to align with the company's marketing team and in order to provide its brand planner and creative team all the core elements they need to know, including dos and don'ts based on a company's preferences and grounded in the initial discover and strategy phases. It includes information such as your primary audience, competitors, where the brand will be communicating, and mandatories such as "use existing color palette," or "leverage brand's existing signature color purple" or it will offer details around specific fonts or other graphics/icons.

✓ Creative concepts

Your branding firm will take time to concept. This includes exploring a range of potential concepts and creative directions for enlivening a completely new or refreshed brand look and feel that aligns with the

strategy. Whether you are refreshing the brand or establishing a new one, the agency will start by creating concepts or a mood board that reflects the potential directions that the look and feel of the brand could take. Creative concepts set the tone, and is the roadmap for establishing a feeling, much like how a builder would create a blueprint and rendering for a house before it would ever consider moving ahead with pouring a foundation! Once the look (visual) and feel (messaging and tone) of the evolved brand is established, it's time to move into the the execution phase.

STEP 4 | CREATIVE EXECUTION

Designing your marketing materials

It's time to move from concepts to creating and designing your assets. Working with your branding agency, you'll need to make a few key initial decisions on how to enliven the chosen creative direction.

Here are examples of two such decisions:

Decision: What are the priorities?

Most companies roll out in phases by prioritizing the initiatives that they need to create in the first phase (e.g., the website, trade show booth and supporting digital marketing and collateral, templates for ads, videos, newsletter, email, PPT to packaging and signage.)

Decision: How to approach the design?

Some very tactical decisions needed include how to approach the creation of the new marketing materials. Will the company want to shoot original photography and/or videos? If so, does the marketing team have a photographer and/or videographer in mind? Does that photographer's style align with the brand's new look? Or, is the company prepared to go through the process of having a branding agency identify the right photographer and plan for a photo or video shoot? Other options entail engaging an agency or your internal design team to identify and purchase stock photography or work from an existing library of imagery/assets.



Conclusion

Lastly, a brand must take an honest assessment of its ability to commit to the level of effort, along with its internal resources to identify what can be done in house versus what requires external expertise or support with capacity.

Here's three considerations:

1. Resources

- What internal resources is your brand prepared to allocate to this effort? Does your team have the expertise or capacity to execute the refresh in-house or will the company need to engage external partners to lead the effort?
- If it requires leaning on a branding agency, will they lead the effort and then turn the brand management over to an in-house creative team and marketing department? Or, is it necessary that your company allocate an annual budget for a branding agency to manage the marketing communications and the creation of new materials on an ongoing basis?

2. Timing

- What is your company's timeline for completing the brand evolution? Is the company prepared to take all steps starting with the strategic phases?
- Has the brand already completed the initial strategic steps and therefore prepared to move into the creative concept phase, shortening the time to completion?

3. Rollout plan

- Is the company prepared to complete an overhaul — which could affect signage for buildings, trucks, packaging, trade show booths, marketing communications and more — all at once or in phases?
- Of course, alongside working on designing and producing your creative brand assets, your team or agency should be planning for both the internal and external brand launches.

Are you ready and committed to evolving your brand and accelerating business growth? We'd love to discuss your company's unique needs.



About C.E.K. & Partners

C.E.K. & Partners is a branding and strategic communications firm that supports brands across payments, financial services, healthcare and manufacturing when they seek market research and brand strategy, along with content and digital marketing. We develop programs that build brands, generate demand and meaningfully connect them to their customers in order to accelerate business growth.

Building a brand is an investment that requires a range of skills and expertise — that's why we're here to help.

Carolyn Kopf

Managing Partner
C.E.K. & Partners
p: +1 404.345.6447
e: carolyn@cekpartners.com
www.cekpartners.com

Copyright © 20120 Carolyn Kopf Inc. . All rights reserved.

www.cekpartners.com