

# Building a Breakout Brand



STEPHANIE  
BOGAN



# What is a Brand?

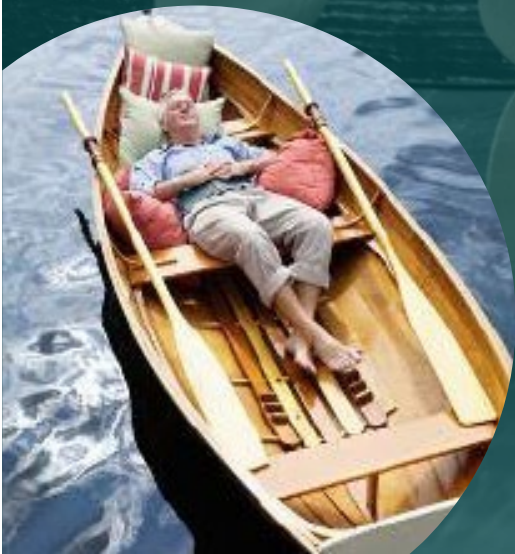


# Brand

(n) defined:

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- An identifiable entity or idea that makes specific promises of value.
- Your brand is a concept and feeling that stays in people's minds.



YOUR BRAND IS A PROMISE  
YOU MAKE TO THE MARKETPLACE.

PRODUCTS ARE  
MADE IN THE  
**FACTORY**  
BUT BRANDS ARE  
**CREATED**  
IN THE MIND

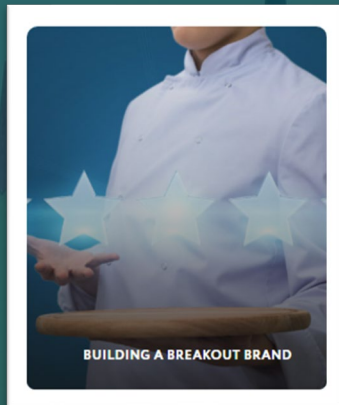
- Walter Landor -

# BUILD YOUR BREAKOUT BRAND

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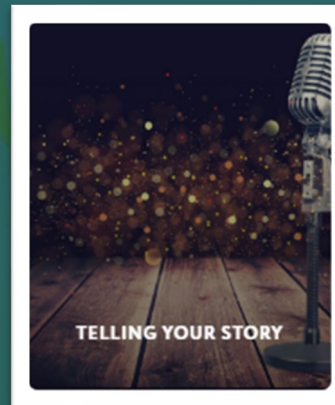
1

BUILD MY BRAND



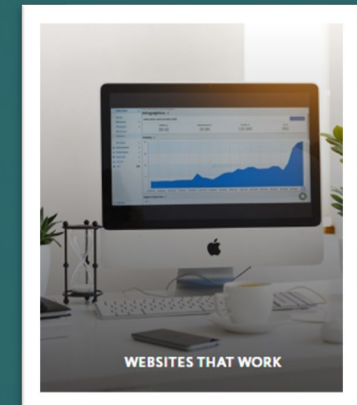
2

TELL MY STORY



3

UPDATE MY WEBSITE



# BRAND ELEMENTS

- ✓ More than buzzword for logo and website
- ✓ Creates an *emotional association*
- ✓ Tells a story *tailored to your audience*
- ✓ Defines and *differentiates* your offering
- ✓ Sets style, *standards and expectations*



*Now for a self-guided tour of your brand...*

# Build-a-Brand WORKBOOK

Use your  
**Build-a-Brand Workbook**  
to capture key notes  
around each facet of your  
brand as we go through  
this lesson.



# Build-a-Brand BLUEPRINT



## BRAND PROMISE

Does your brand make a **clear promise**?

Is there a **simple message** or are there multiple, competing messages?

Is your promise **client-focused** or you-focused?



## TARGET AUDIENCES

Who is your **target audience**?

Is your brand **clearly directed** to this audience?



## CLIENT MOTIVATORS

Does your brand address **key client needs and pain points**?

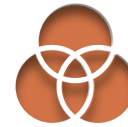
What **problems do you solve**?



## BRAND IDENTITY

Are you **consistently communicating intangible attributes** across the brand messages and materials?

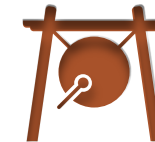
Does brand use **elevate brand** or dilute it?



## MARKET POSITION

What is your **single biggest differentiator**?

Do your prospects and clients know and understand this point of difference and **respond strongly** to it?



## VALUE PROPOSITION

What is the **emotional payoff/benefit** for your target audience?



## KEY MARKETING MESSAGES

What are the **key marketing messages** that define your brand promise, values and market position?

# BRAND PROMISE

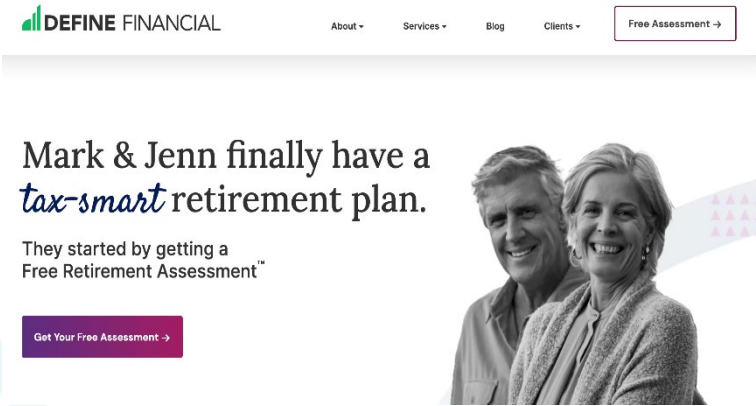
A brand promise is the promise your firm makes to the marketplace.

- Nike = Action
- Mercedes = Luxury
- BMW = Performance
- Limitless = Success w/ Freedom
- You = ?



It is not a website or an elevator pitch; it is the feeling people have about your firm.


# TARGET AUDIENCE / IDEAL CLIENT



**DEFINE FINANCIAL** About Services Blog Clients [Free Assessment →](#)

Mark & Jenn finally have a *tax-smart* retirement plan. They started by getting a Free Retirement Assessment™

[Get Your Free Assessment →](#)



HOME MEET THE TEAM WHAT WE DO **PLEASANT WEALTH** BECOME A CLIENT INSIGHTS [SCHEDULE CALL](#)

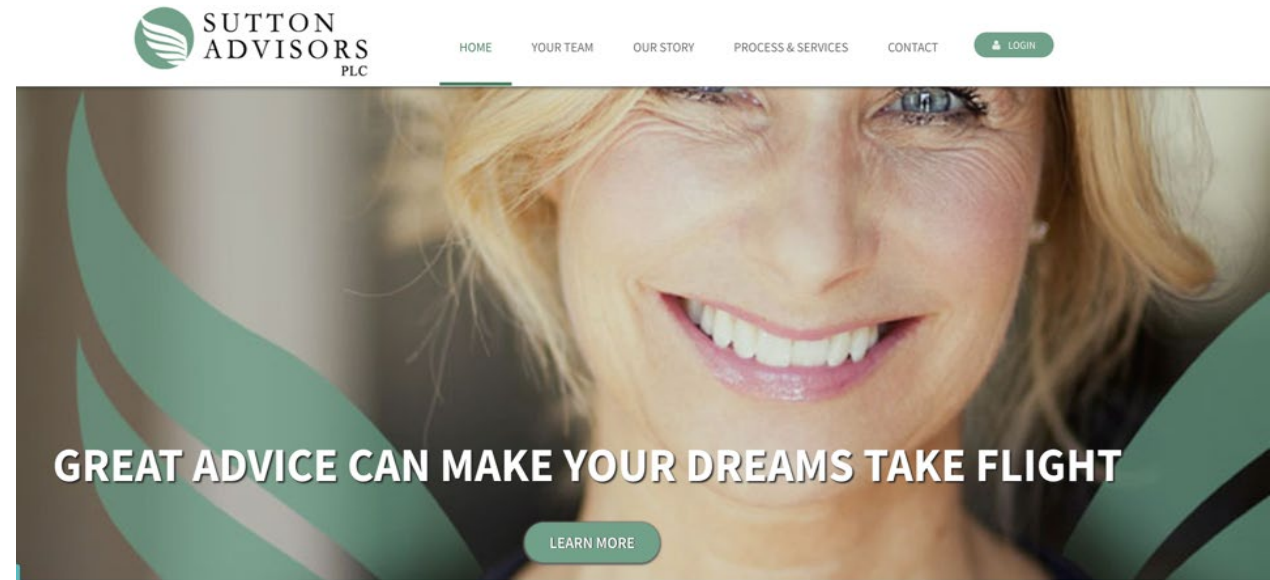


YOU DON'T HAVE TO GO IT ALONE

## Smart financial strategy for retiring women.

It's time to feel good about money again.

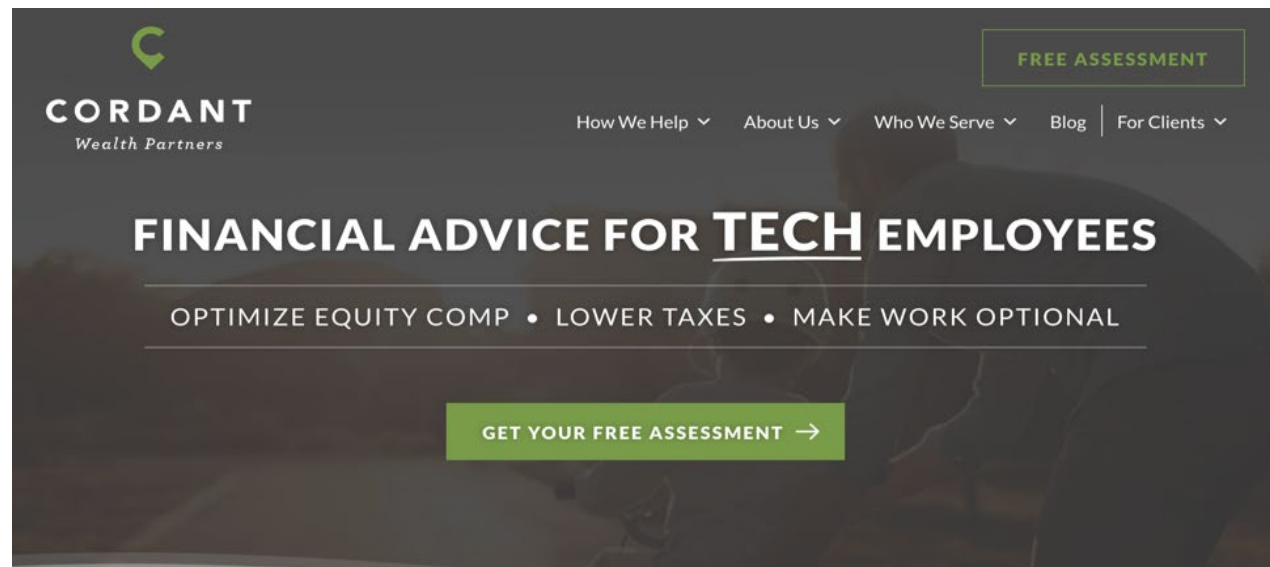
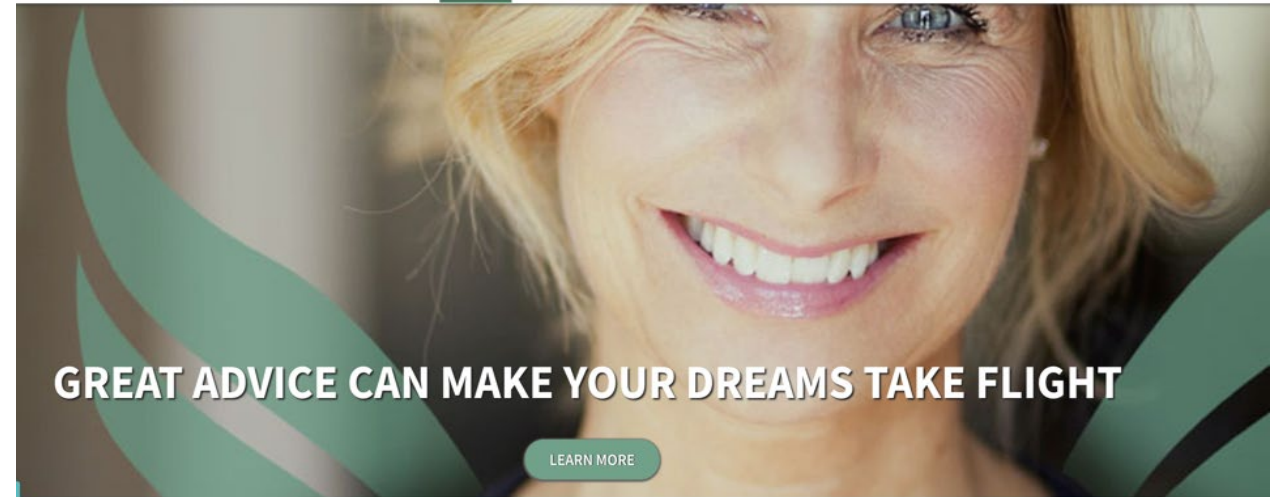
[LET'S START THE CONVERSATION](#) [WHAT WE DO](#)



**SUTTON ADVISORS PLC** HOME YOUR TEAM OUR STORY PROCESS & SERVICES CONTACT [LOGIN](#)

## GREAT ADVICE CAN MAKE YOUR DREAMS TAKE FLIGHT

[LEARN MORE](#)



**CORDANT** Wealth Partners [FREE ASSESSMENT](#)

How We Help About Us Who We Serve Blog For Clients

## FINANCIAL ADVICE FOR TECH EMPLOYEES

OPTIMIZE EQUITY COMP • LOWER TAXES • MAKE WORK OPTIONAL

[GET YOUR FREE ASSESSMENT →](#)

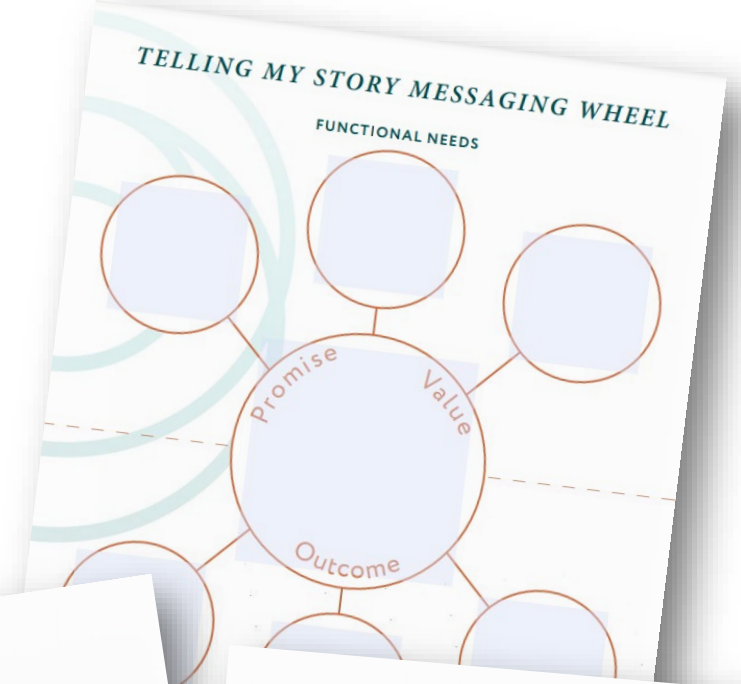
# CLIENT MOTIVATORS

Driving EMOTIONAL forces behind your target market—the REASONS those individuals are motivated to engage with your services.



- ✓ HOPES
- ✓ GOALS
- ✓ DREAMS

- ✗ NEEDS
- ✗ QUESTIONS
- ✗ PAIN POINTS



## Client Motivators

Client motivators are the driving forces behind your target market—the reasons those individuals are motivated to engage with your services.

Motivators can be positive or negative. Positive motivators include hopes, goals and dreams. Negative motivators include needs, questions and concerns. Client motivators are rarely based on facts; they are emotional forces that compel individuals to seek out your services. An effective brand and brand architecture will speak directly to the client motivators of your target market, thus ensuring you attract those individuals' attention and resonate with them.

Your marketing messages should consistently reflect the needs, goals and motivators of your clients. They must recognize that you relate to and understand their situations, endowing them with confidence that your experience can meet their needs.

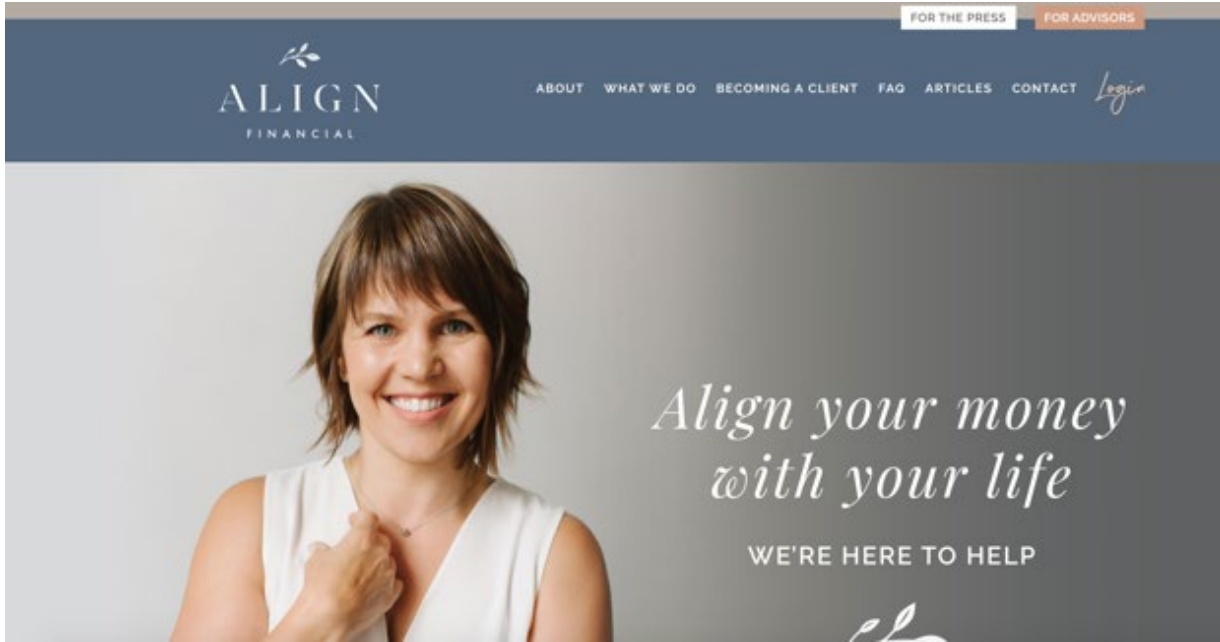
Client motivators:

*Create a comprehensive list of the issues, needs, pain points and desired outcomes of your ideal client!*

BUILD-A-BRAND



# BRAND IDENTITY



## SECONDARY LOGOS + SUBMARK



## BRAND WORDS

EXPERT | INNOVATIVE | CARING | INDEPENDENT | DYNAMIC

An innovative and highly qualified financial planning firm dedicated to providing honest, expert and client-centric advice specifically tailored to the unique needs we all face in times of transition and change.

## BRAND MESSAGE

Align Financial (AF) is a dynamic and cutting-edge, caring, client-centric company whose ethos is heavily embedded in the message of trust, support and authenticity. Unlike other financial planning firms, the foundations of AF are based on transparency, consideration, and a genuine desire to help and inspire clients as they seek to gain confidence over their financial situation.

Uniquely designed to reflect the style and personality of founder Tanya Nichols, AF is an engaging brand modelled on a fresh and unique stylistic approach. It is a brand that strives to do away with the outdated and generic image of the financial planning world, and inject a dynamic new energy into this field with refreshing modernity and elegance.

Thoughtfully created to serve the interests of the user, the AF website is vibrant, clean and high-functioning. Visitors should feel welcome and relaxed, and inspired to learn more about AF as a whole. The barrier of technology should feel stripped away, creating the sense that they have met Tanya in person rather than viewed a website, and garnered a strong sense of the warmth behind the brand. This element of trust and relatability is inherent in everything Tanya does, and is an integral and uplifting component of the work of AF.

## BRAND IMAGERY



Secure



Successful



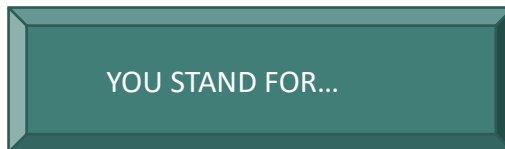
Caring



Friendly



The Firm



# MARKET POSITION

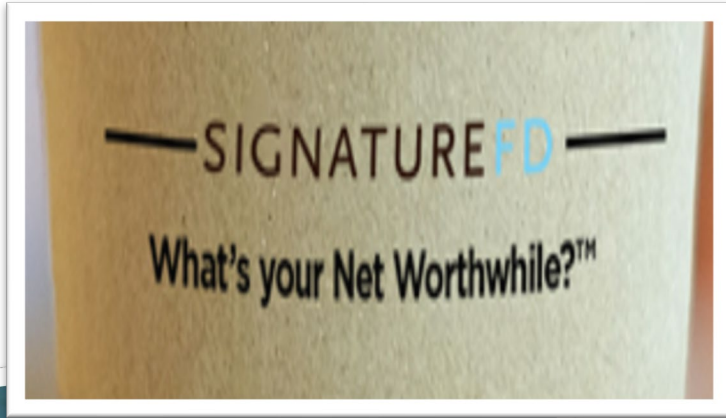
What is the personal promise your brand makes? Single biggest differentiator?

Do your prospects and clients know and understand this point of difference and respond strongly to it?

# Value Propositions

*Client Centric not Firm Centric*

**"Let me teach you how to retire!"**



## FINANCIAL ADVICE FOR TECH EMPLOYEES

OPTIMIZE EQUITY COMP • LOWER TAXES • MAKE WORK OPTIONAL



## Plan your Remarkable Retirement

▶ Optimize Income ▶ Minimize Taxes ▶ Invest Wisely

Get started with your Free "Remarkable Retirement" Roadmap



# MARKETING MESSAGES



About ▾ Services Learning Center ▾ Contact Client Login [Start Here](#)

Just launched [Markets and Economy Webinar](#)

## Plan your Remarkable Retirement

▶ Optimize Income ▶ Minimize Taxes ▶ Invest Wisely



Get started with your Free "Remarkable Retirement" Roadmap

SignatureFD website header and hero section. The header includes social media icons (Twitter, Facebook, LinkedIn) and navigation links: PEOPLE + CULTURE, NEWS + INSIGHTS, WHO WE SERVE, CLIENT LOGIN, CONTACT US, IMPORTANT DISCLOSURES, FORM CRS/ADV. The hero section features a dark blue background with a white text box containing the headline: "SIGNATUREFD UNDERSTANDS THE RELATIONSHIP BETWEEN WEALTH AND WORTH." Below the headline is a sub-headline: "We define wealth as the accumulation of more and worth as the achievement of better. At the intersection of Wealth & Worth is where we can help define what 'have it all' means to you." A "SPEAK TO AN ADVISOR" button is located below the sub-headline. To the right of the text box is a diagram showing two overlapping circles labeled "WEALTH" (The Accumulation of More) and "WORTH" (The Achievement of Better). A "SPEAK TO AN ADVISOR" button is also present in the top right corner of the hero section.

Limitless website header and hero section. The header includes navigation links: APPROACH, COACHING, LEARN, LIMITLESS, PEOPLE, CONNECT, GET MOVED HERE. The hero section features a photograph of a smiling man in a suit. Overlaid on the photo is a large teal circular graphic. The headline reads: "Work with greater success. Live with greater freedom." Below the headline is a sub-headline: "It's time to elevate your thinking, accelerate your success and enjoy greater freedom." A "SCHEDULE A CALL" button is located in the top right corner of the hero section.

Pleasant Wealth website header and hero section. The header includes navigation links: HOME, MEET THE TEAM, WHAT WE DO, PLEASANT WEALTH, BECOME A CLIENT, INSIGHTS, SCHEDULE CALL. The hero section features a photograph of a smiling woman in a yellow top. The headline reads: "Smart financial strategy for retiring women." Below the headline is a sub-headline: "It's time to feel good about money again." Two buttons are located at the bottom: "LET'S START THE CONVERSATION" and "WHAT WE DO". Social media icons (Facebook, LinkedIn, Instagram) are in the top right corner.

These messages should be clear, concise and client-centric (and used consistently)

# WEBSITE

Tells your story to a select audience

SUTTON ADVISORS PLC

HOME YOUR TEAM OUR STORY PROCESS & SERVICES CONTACT LOGIN

TODAY'S ACTIONS MUST SERVE TOMORROW'S NEEDS

LEARN MORE

> 0 0 0 0 0 0

SIGNATUREFD

ETHOS + APPROACH TEAM CULTURE TOOLS AND INSIGHTS CLIENT LOGIN CONTACT US IMPORTANT DISCLOSURES

THE WORLD WOULD BE A BETTER PLACE IF \_\_\_\_\_

SIGNATUREFD

What's your Net Worth?™

TRUE WEALTH IS MORE THAN JUST THE ACCUMULATION OF MORE

HOME MEET THE TEAM WHAT WE DO

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LET'S START THE CONVERSATION WHAT WE DO

FOR THE PRESS FOR ADVISORS

ALIGN FINANCIAL

ABOUT WHAT WE DO BECOMING A CLIENT FAQ ARTICLES CONTACT Login

Align your money with your life

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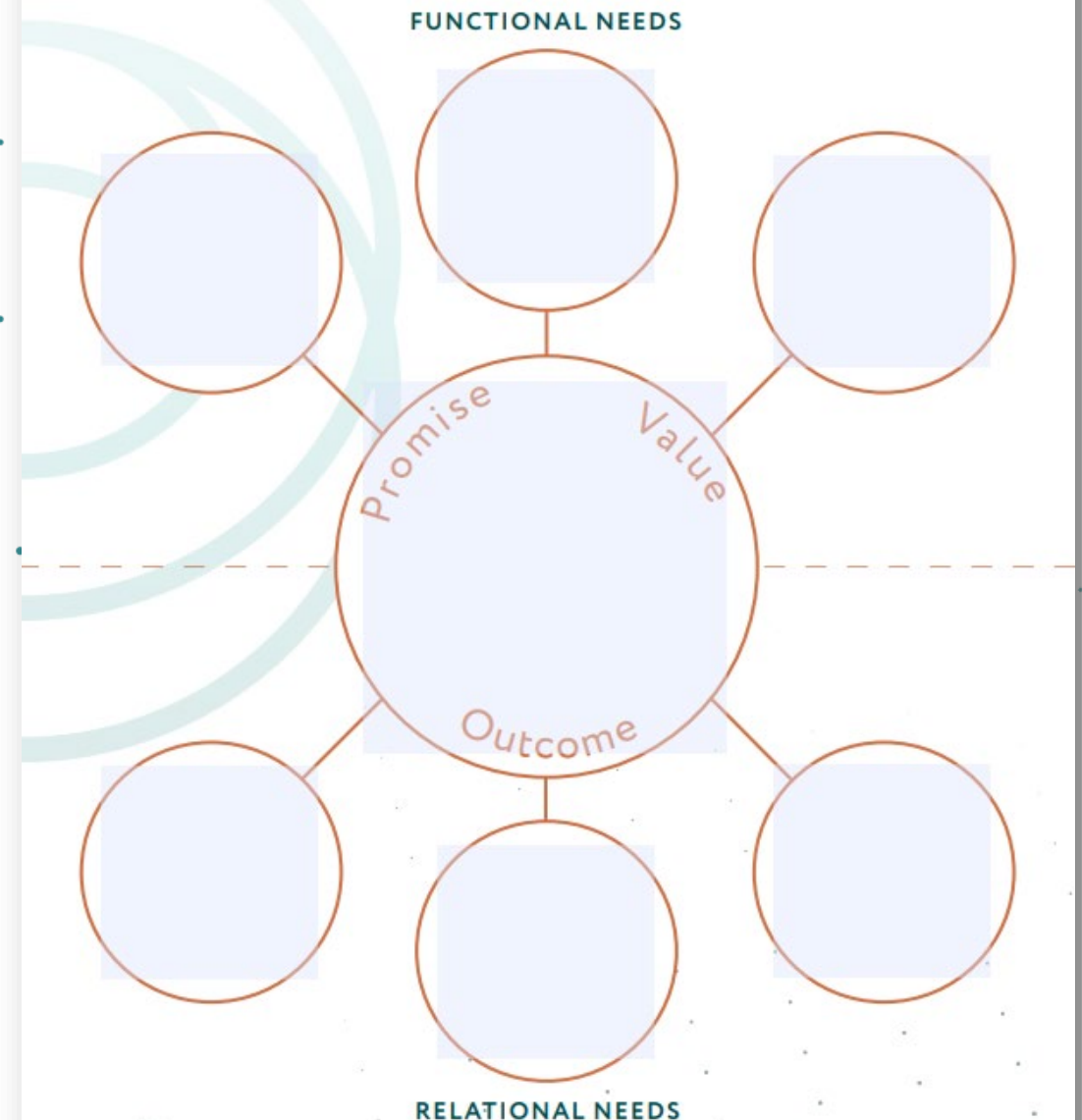
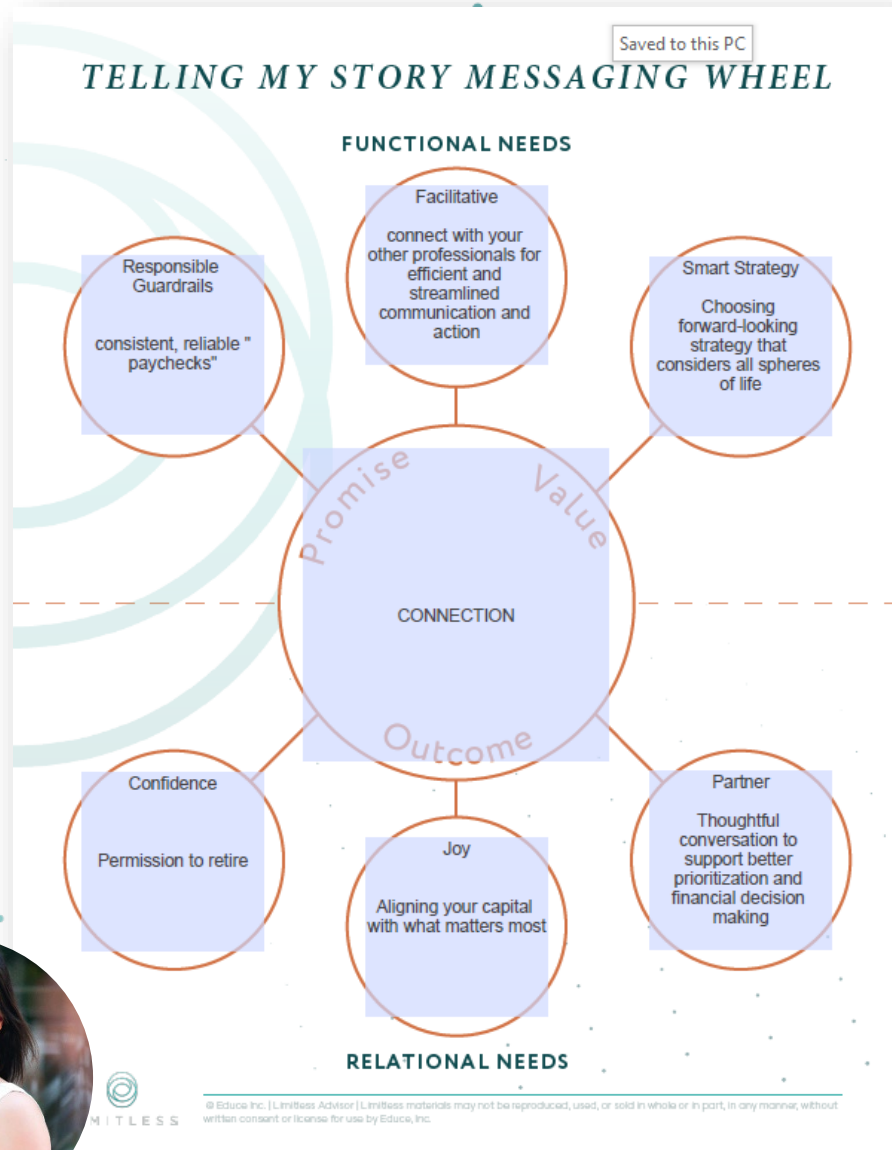
Mark & Jenn finally have a tax-smart retirement plan.

They started by getting a Free Retirement Assessment™

Get Your Free Assessment

# LET'S BREAK IT DOWN

## TELLING MY STORY MESSAGING WHEEL



It must fit

YOU





# THE PACKAGING PROCESS

# PRICING & POSITION



Audience



Value Position



# Brand-Building TEMPLATE

An effective brand will be clear, compelling and applied consistently across all aspects of your firm. Your brand should be reflected in everything you do and in everything working with you. A

## CLIENT MOTIVATORS: The "Why"

Client Motivators are the driving motivators of your Target Market—they identify the reasons Target Market is motivated to engage with your services. Motivators can be positive or negative. Positive motivators include hopes, goals and dreams. Negative motivators include needs, que and concerns. Client motivators are almost always based on emotion, not facts. The emotional forces that compel individuals to seek out your services.

### Move from here:

- Uncertainty
- Burning Questions
- Overwhelm
- Problems/Stress
- Sole Decision-Making

### To There:

- Clarity
- Education
- Comfort
- Possibilities/Solutions
- Trusted Advisor(s)

List experiences and outcomes clients using from/to model or by simply listing the biggest points and opportunities of your target client.

LIMITLESS

## TARGET MARKET

A target market is the particular group of people (market segment) to whom your services are intended and marketed. Target markets are defined by demographics, often including financial criteria (assets), age, gender, profession, interests, psychographics, or other combinations of qualities. Your target market should consist of individuals who are most likely to receive value from—and based on this, buy from—you. The more focused and specific your target market, the more able you are to successfully target this market.

### • Target #1 characteristics (economic and otherwise)

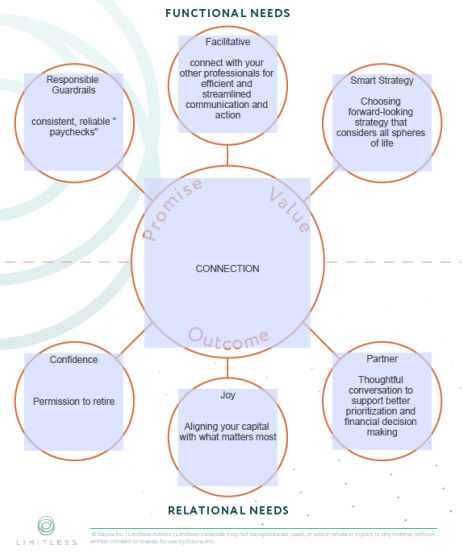
- Quality 1
- Quality 2

### • Target #1 characteristics (economic and otherwise)

- Quality 1
- Quality 2

LIMITLESS

## TELLING MY STORY MESSAGING WHEEL



Brand Building Template

Messaging Wheel



## VALUE MESSAGING WORKSHEET

Complete this worksheet to help you clarify, define and package your brand messaging points into a clear, concise and compelling prospect story.

### IDEAL CLIENTS

Who are your ideal clients? List the top 5 characteristics of the clients your message reaches to serve.

1.	_____
2.	_____
3.	_____
4.	_____
5.	_____

FROM HERE   BEFORE STATE	WHY THERE & BENEFITS	TO HERE   AFTER STATE
_____	_____	_____
_____	_____	_____

### WHAT I DO

Tell your story in the audio outcome you help create.

THE VALUE OFFER	Key Outcome #1	Key Outcome #2	Key Outcome #3
Define the 3 key outcomes and/or value of working with you.	Supporting Point	Supporting Point	Supporting Point
1. _____	1. _____	1. _____	1. _____
2. _____	2. _____	2. _____	2. _____
3. _____	3. _____	3. _____	3. _____
4. _____	4. _____	4. _____	4. _____
5. _____	5. _____	5. _____	5. _____

### 3 KEYS TO DELIVERING

Define the three messaging points that best express your firm, its purpose and promise for delivering value.

1. Key Message	2. Key Message	3. Key Message
Define key points regarding the <b>WHY</b> you exist as a firm. Name: _____	Define key points regarding the <b>WHAT</b> you provide as a firm. Name: _____	Define key points regarding the <b>HOW</b> you deliver as a firm. Name: _____
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____

LIMITLESS

- Your messaging needs to express the value you offer to your clients, why and how you are positioned to deliver that value. Your messaging should cover:
- When you serve, your target client profile
  - Your approach to solve theirs
  - The before and after state of working with you
  - Why you rather than any other advisor
  - Proof points, demonstrate proof of concept

All of these ideas need to be expressed quickly and succinctly in a few sentences that you can share in a clear, concise and confident way.

Building Your Story Messaging Worksheet

## Market Position

As defined by Branding Strategy Insider, positioning is "the process by which marketers try to create an image or identity in the minds of their target market for their product, brand or organization."

Simply put, market position is how your target audience views you in relation to your competitors. Good market position will accomplish two things: identify your firm as unique and represent a benefit valued by your target audience.

You are competing for mindshare among that audience. The human brain is designed to identify and retain information that is unique, whether good or bad. Given the volume of background noise our brains must filter, it is not hard to understand why effective positioning is important. Your firm needs to stand out among the crowd.

Your market position seeks to establish a position of dominance for your firm, one attractive to your target audience. For example, "We're no. 1," "The **Unbeatable**," and "the happiest place on Earth" are all slogans that establish a market position while ensuring the competition cannot own this space.

Market position:

The \_\_\_\_\_ Firm  
The WHAT Firm?

## Brand Style

Your brand style is the design scheme that defines your brand and sets the tone for your brand aesthetic. The qualities and personality of your firm and brand are reflected in your brand style.

For example, if your brand is "luxury," then all extensions of the brand should reflect luxury. By contrast, if your brand is "sophisticated success," then brand style should reflect that.

All brand interactions and experiences with your firm should reflect your brand style, including these:

- Website
- Marketing materials
- Furniture and decor
- Amenities (e.g., reading materials in waiting room, refreshments)
- Performance reports
- Building, office space, meeting areas

What style do you want your brand to reflect?

Brand Brief Tool



## LEARN MORE

- Brand Identity Breakthrough: How to Craft Your Company's Unique Story to Make Your Products Irresistible, Gregory Diehl
- Building a Story Brand, Donald Miller
- Fascinate: How to Make Your Brand Impossible to Resist, Sally Hogshead



## ADAPT & APPLY

- Use the Brand-Building Worksheet (pages 1-2) to define and design your brand / revisit your existing brand effectiveness.
- Review the messaging on your worksheet together with your Telling Your Story session content and write your "What I Do" introduction on page 3.
- When ready to dive deeper, use either the Brand Design Template (PPT) or the Brand Brief Tool (Word document) to further identify brand attributes and marketing messages.



## TAKE ACTION

- Update your existing marketing and prospecting resources to reflect your brand.



LIMITLESS Q&A