GUIDE

YOUR BRAND WORKSHOP CHEAT SHEET

A cohesive brand identity aligns your messaging, provides structure to your content and helps drive growth for your business.

NEW BREED

ABOUT NEW BREED

We are a revenue management firm for the world's fastest-growing B2B companies. We serve over 200 B2B clients in a range of verticals including SaaS, telecommunications, IT services, manufacturing and business services.

Through the alignment of people, process and platforms, we drive success for our customers. Backed by our technical expertise and partnerships with HubSpot, SaaSWorks, Salesforce, Drift and Vidyard, our services and solutions not only address every touchpoint a prospect has with your company, they lead to proven, measurable and predictable outcomes.

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YOUR BRAND WORKSHOP CHEAT SHEET

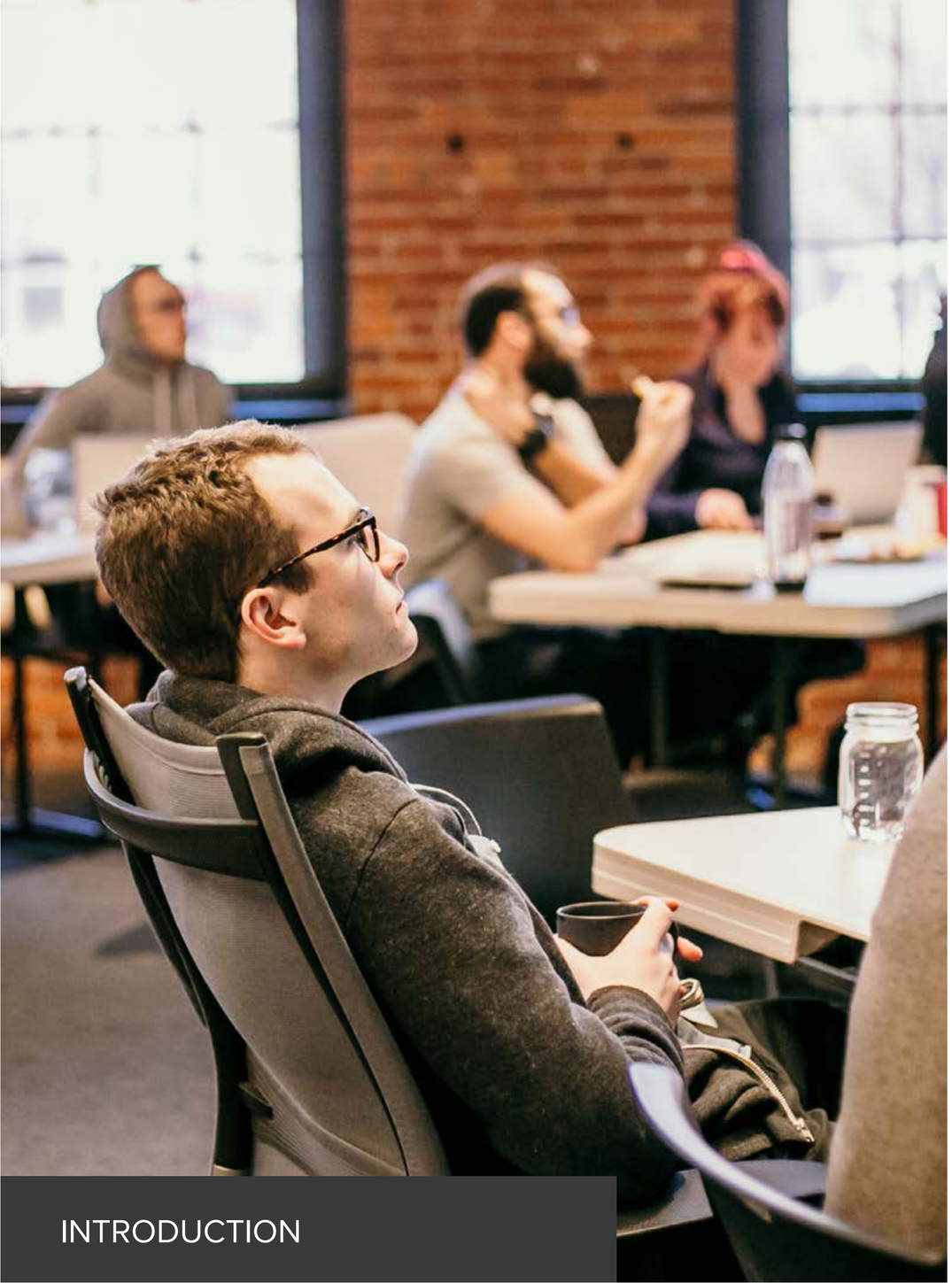
As a marketer, you may hear the terms “brand” and “logo” used interchangeably, which is inaccurate. A logo is certainly the visualization of your business, but a brand actually goes quite deeper than that.

Your brand is the combination of your organization’s values, how you communicate those values and what people see and think about your business. In a crowded marketplace, a cohesive brand is essential to differentiate your business and solution from your competitor’s.

Having a logo doesn’t mean you have a brand. What does that logo stand for? How does that concept incorporate itself seamlessly into your marketing? Your solution? Having answers to these questions will ensure that the content you create leaves the desired impression on your prospects and customers.

Whether you’re refreshing an existing brand or starting a new one, these questions can provoke different answers depending on who you talk to in your organization. That’s where a brand workshop comes in.





INTRODUCTION

At New Breed, we run brand workshops for our clients to get to the heart of those questions, exploring and defining their brand. Eventually, those answers inform the client's greater content and marketing strategy, fostering a lasting brand identity.

The purpose of a brand workshop is to define who you are as an organization: your mission, your values and how you will talk about those aspects of your business. A workshop helps facilitate the discussion, preparation and refinement of those high-level aspects of your brand. Workshops are versatile enough to be used by established organizations or start-ups.

These workshops can be a significant undertaking, but they're an absolutely vital part of your marketing and product strategies. With the right prep and the right stakeholders in the conversation, you'll emerge with a cohesive identity that ties all your efforts together.

How To Use This Guide

This guide serves as a tool to inform both the planning and running of your very own brand workshop. Also included is a blank workshop presentation template to utilize during your brand workshop that depicts the aforementioned exercises. The facilitator should be prepared to present and manage these discussions after reading through this guide.

The next section of this guide will walk you through how to plan for your brand workshop, including deciding who should attend, setting expectations for your participants and gathering the materials you need to effectively facilitate the workshop.

Once you've completed the planning phase, the following section will provide insights to the workshop facilitator on how to run the exercises included in the attached workshop and guide conversations during it. These exercises are designed to enable a team to think strategically and creatively about a brand, with deliverables associated with each exercise.

Finally, what's drafted in a workshop may need tweaking or refinement. The point is to draft a cohesive structure for your brand. From there, you should align your existing and new messaging with that structure, create guidelines for future use and ultimately drive growth for your business.





PLANNING YOUR BRAND WORKSHOP

Audit Your Content

A content audit is an incredibly helpful resource to leverage before and after your brand workshop. You should review the materials you're currently using in your marketing, such as blog posts, sales decks and premium content offers.

The purpose of this audit is to determine how you currently talk about your brand. What perceptions about your brand does your existing material give off?

The results of your content audit can inform your brand workshop in a number of ways. Your review may find a variety of identities or voices present in your content that need to be streamlined.

Your content may be entirely aligned — all giving off the same message — but not at all how you think your brand should be portrayed.

Your workshop participants may choose to hone in on something uncovered in the audit as the right direction or choose to go another way entirely.

Without this information in advance, your brand workshop can lack a starting point. You may spend more time coming to terms with what you're currently doing rather than mapping out what you should be doing, which is just a waste of the group's time.

After the workshop, your content audit informs what technical work has to be done. Which blog posts need to be updated to reflect your established mission? What premium content offers need to be updated to match the newly refined brand voice and style guide?

Performing a content audit beforehand helps build a foundation for the conversations within your workshop and provides a proverbial checklist for the work to be done after it is completed.

Assemble Your Team

The voices in the room are an important element of a successful brand workshop. The output of your workshop — your brand — is the ultimate starting point for everything you do as an organization. So, you should ensure that key stakeholders are well-represented.

As a whole, ensure that your workshop team is evenly balanced throughout the organization to ensure no one area can lead the conversation in a particular direction. While 5–10 people is the ideal size for a brand workshop, collaboration and representation are key.

Brand workshops can easily be broken out into smaller groups to present different directions. Larger workshops mean more people are ultimately bought into and familiar with a new brand from the get-go, but they may also take more time to properly facilitate.

Additionally, your workshop participants don't all have to be long-term employees. Newer employees may be more likely to present radical ideas or deviate from the status quo. The greater variety you can bring into your workshop across departments and seniority levels, the more thought-provoking and holistic your workshop will be.





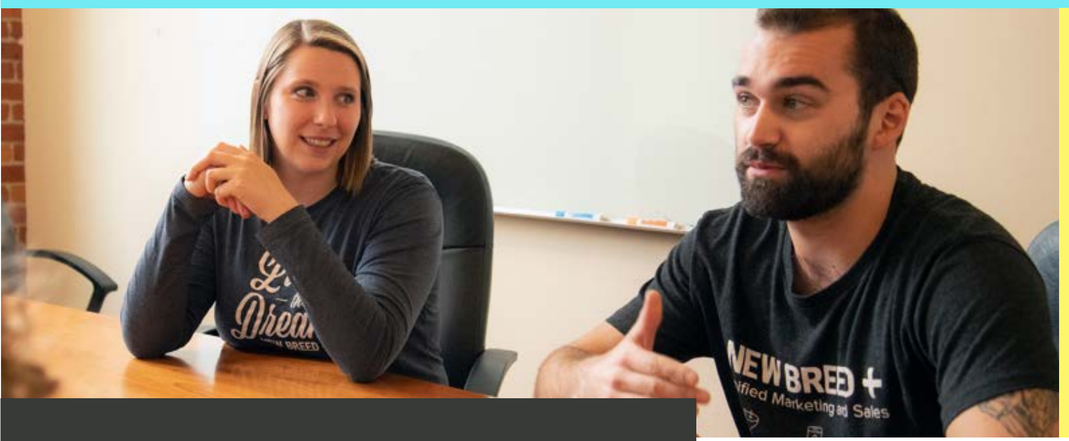
MARKETING TEAM REPRESENTATIVES

Branding often falls to the marketing team. As the individuals most likely to work with the brand on a day-to-day basis, their voices are important to the workshop. A representative from your marketing team can provide valuable insight to the buyer's journey and how audiences engage with your brand on a regular basis.

PRODUCT TEAM REPRESENTATIVES

Though your brand is more than just your product, that solution is likely at the heart of what you do. The solutions that you provide to clients should align with your brand's vision and mission, so understanding how existing and potential customers interact with your product or others in the marketplace is an important part of shaping your brand.





SALES TEAM REPRESENTATIVES

While your marketing and product teams have a lot of insight into your organization's solutions and position in the marketplace, your sales team is interacting with customers on a regular basis. Not only can they offer perspectives on the common challenges and pain points facing your prospects, but they're well equipped to answer how prospects think and feel about your brand.



LEADERSHIP REPRESENTATIVES

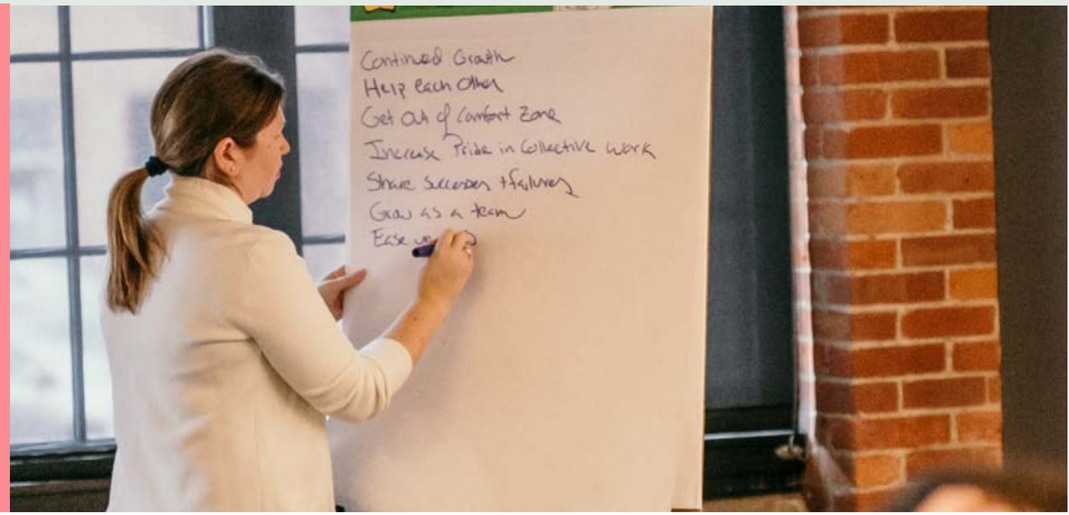
The need for representation from your leadership team should go without saying. More than likely, they are best prepared to speak to the vision of your organization and its role in the marketplace, especially from an aspirational perspective. Their insight in this area is vital to shaping your brand's vision and mission.

While fundamental to guiding the direction of your organization, it's also important to ensure that leadership does not overwhelm the group. Does your entire executive team need to be in the brand workshop? Unlikely. Workshop teams should be evenly balanced to ensure voices are heard across the organization.

NOTETAKER

No brand workshop would be complete without a notetaker. In order to effectively dilute the discussion into meaningful deliverables and client-facing materials, someone has to take clear and detailed notes during your workshop.

Since most of the exercises featured in this guide last between 30 and 45 minutes, a variety of ideas may be shared before landing on a direction for a given message. The notetaker is responsible for capturing the ideas that can be referred back to after the workshop when assets are being created.





WORKSHOP FACILITATOR

The workshop facilitator is likely the most challenging role to fill. As the person responsible for guiding participants through the workshop and starting — and ending — conversations, they should be as impartial as possible.

A facilitator has to be charismatic enough to keep participants engaged and creative energy flowing, but not overbearing or invested enough to steer the conversation in any particular direction.

The facilitator must keep the group on time and settle disagreements that may arise. It is the role of the facilitator to determine when to bring conversations back for homing in on a deliverable and ensuring all voices are heard.

The brand workshop template included in this guide should enable any individual to step in and run the workshop without inserting themselves into the conversation. That said, neutral third-parties make great facilitators because they have no stake in the outcome of the workshop.

Set Expectations

After you have assembled a team of people to participate in your brand workshop, you will need to set expectations for the group. What are they getting into? What's the expected outcome of this workshop? Do they need to do anything in advance?

The most important outcome of a brand workshop is the structure that will ultimately frame your messaging, content and product. Participants in the workshop should understand that they're getting together to actively discuss and craft that framework.

As far as homework goes, the less work done by participants in advance, the better. While a content audit helps inform the workshop, it doesn't have to be a shared responsibility. Coming into a workshop free of homework alleviates stress and prevents participants from pitching their particular ideas. Instead, team members are enabled to be authentic and provide in-the-moment feedback and perspectives.

Physical Space and Materials

Your team is ready and eager to get started on crafting the future of your brand. Make sure you have a space established to foster creative energy and promote collaboration.

A brand workshop is an excellent opportunity to take people out of the office. Aside from eliminating potential distractions, branding is a creative and dynamic process. Taking people out of their standard environment can promote fresh ideas and invigorate participants.

If leaving the office isn't possible, facilitators should take every possible measure to prevent distraction and keep participants focused and invested in the workshop. With that in mind, it's important to factor timing into your planning.

Allocate enough time for your workshop to ensure that participants don't feel rushed and that conversations don't get cut short. Remember, your brand sets the foundation for everything you do as an organization. Four to five hours may seem like a lot of time, but when used properly, you shouldn't have to revisit your brand for a while.

With space secured and calendars blocked for several hours, it's time to collect the rest of your materials. Sticky notes, markers and whiteboards (or poster paper for the wall) are essential.

These materials encourage active participation from your attendees in that they empower them to get out of their seats, discuss with one another and review what others are saying rather than staying behind a computer screen.

Finally, you're going into a very long meeting. Snacks, coffee and other refreshments will be much appreciated during breaks!





HOW TO RUN YOUR BRAND WORKSHOP

Assuming you have all the materials, people and time allocated in advance, the pages in this section will assist you in facilitating your brand workshop. These pages directly align with the slides provided at the end of this guide and are meant to give insight on how to run the various exercises.

The following exercises are designed to draw out the necessary elements that form a brand identity, including mission and vision statements, messaging pillars and more.

GUIDELINES BEFORE YOU START

In order for you to gain the maximum benefit from your brand workshop, all participants should follow these guidelines. These guidelines are also depicted in the included presentation template.



CHALLENGE RESPECTFULLY

Participants won't agree with everything they hear. They should be encouraged to respectfully challenge the status quo or play devil's advocate.



CHECK EGOS AT THE DOOR

Nothing said in a workshop is meant to build up or put down any one aspect of the business — it is the formation of an entire brand.



THINK SIMPLE

Brand workshops work to dilute something very complex and technical into something simple and emotional. Deliverables need to resonate with people who don't do what your participants do.



ASK STUPID QUESTIONS

The best brand workshops thrive on stupid questions. "What do we do?" is not a stupid question. Asking those questions will drive participants closer to the most authentic, genuine answer.



PRACTICE DIVERGENT AND CONVERGENT THINKING

With each of these exercises, spend time listening to every idea possible. Encourage participants to grow ideas and not challenge them. Once everything is in the open, the group can begin to narrow them down.



TREAT IT LIKE A PRODUCT-FREE ZONE

A product or service is not the end-all-be-all of what a business does. When thinking about a brand, think about the "why" and "how" rather than the technical "what."



WARM-UP: 1,000 USES

TIME: 10 Minutes

A warm-up is an excellent opportunity to level-set with participants and get creative juices flowing. Without a warm-up, it can be difficult to dive right into the high-level conversations that accompany brand work.

Divide the group into pairs or smaller groups and assign them an item from the list below. Instruct the teams to brainstorm up to 1,000 uses (without repetition) for their item. After five minutes, have teams present their tallies and some creative uses to the rest of the team.

- Paperclip
- Stapler
- Broom
- Carrot
- Ruler

EXERCISE #1: BRAND PYRAMID

TIME: 60 Minutes **DELIVERABLE(S):** Vision Statement, Mission Statement, Value Proposition

A brand pyramid is a combination of a brand's vision, mission and value. It is the marriage of what a brand is and what it does. Like a pyramid, each of these levels supports what is above it.

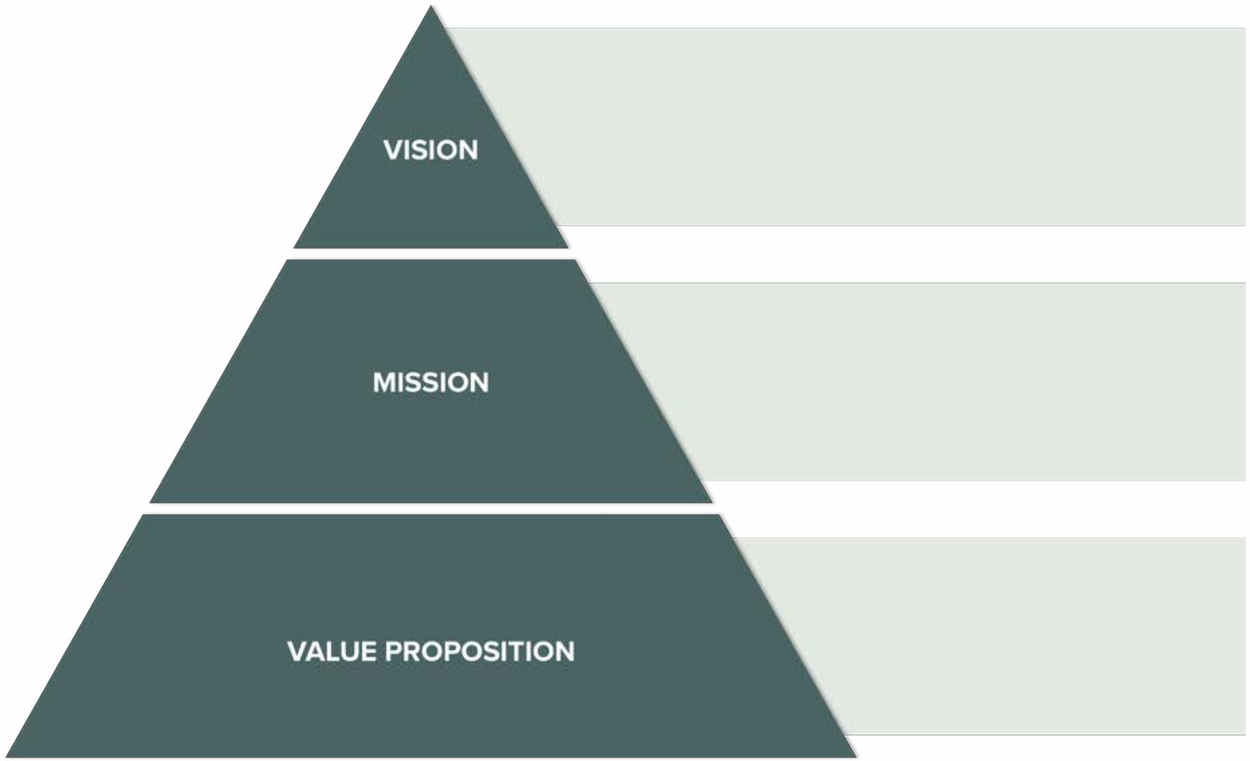
VISION STATEMENT

A brand vision is the why behind a business. When working on a vision statement, have the group discuss the following questions:

1. Why were we founded?
2. Why do we do what we do?
3. Imagine that in 10 years, a front-page headline is written about our brand. What does the headline say?
    a. Have we rid the world of a problem? Changed how business is done? Grown to be the largest business in our industry?

Once these questions have been answered, review the answers with the team and begin to consolidate them into a cohesive vision statement.

Throughout this exercise, it can be easy for the team to spend a lot of time trying to get the wording perfect. As the facilitator, remind the group that these statements should be refined after the fact, as long as the direction is agreed upon.



MISSION STATEMENT

The second level of the pyramid is the mission statement — it's how a business executes on the vision. Remind participants that the workshop is a product-free zone. To determine how a brand supports its vision, encourage the group to answer these questions:

1. What do we do?
2. How do we do it?
3. Who do we do it for?

Once these questions have been answered, review the responses with the team and begin to consolidate them into a statement that describes how they will support the vision.

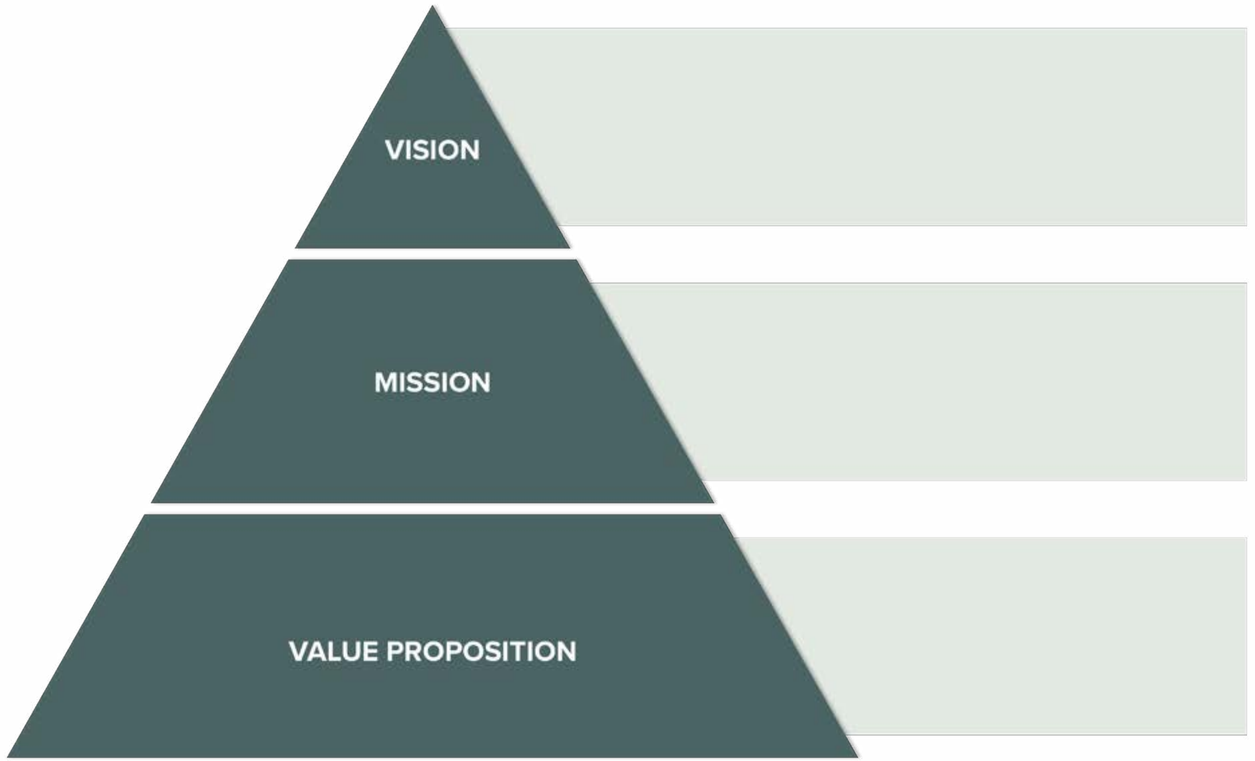
VALUE PROPOSITION

The third and final level of a brand pyramid. What sets the organization apart from all of the rest? It's likely that there are other organizations out there that are striving for the same vision. A value proposition is why this organization will actually achieve it. As a group, discuss the following:

1. What do we offer that no one else does?
2. Why is what we do better than any competitor?

With these questions, it's okay for some product language to creep in. Encourage the group to go beyond the product and think about the emotional story that sets the brand apart. (Expertise, service, perspective, etc.)

With these answers, you can craft a strong value proposition that describes how you will accomplish your mission and vision.





EXERCISE #2: MESSAGING PILLARS

TIME: 45 Minutes **DELIVERABLE(S):** Brand Messaging Pillars

Every brand should have an elevator pitch — it likely sounds a lot like the mission, vision and value proposition detailed in the previous exercise. Messaging pillars expand on that pitch and convince your audience that the pitch is accurate. Think of it as the conversation for when the potential client sets a time to meet after a shared elevator ride.

For this exercise, the group will define 3–5 core characteristics of the brand that will serve as brand pillars. Have the group spend 10 minutes writing down the characteristics of the brand and what the organization does on sticky notes. Use these questions to fuel your brainstorm:

1. How would you describe what we do to a seven-year-old?
2. What confuses people the most about what we do?
3. What do we do better than anyone in our space?

Instruct attendees to put the sticky notes on a wall before reviewing as a group. Next, participants should begin to identify common trends or repeated phrases. Discuss as a group the words and phrases that resonate most with your mission and vision.

After the group has identified those core characteristics of your brand, direct discussion toward proving those characteristics. Ask participants what the business does to earn that characteristic. For example, if the group says your brand “Revolutionizes How Businesses Grow” encourage them to discuss and document how they do it.

EXERCISE #3: PERSONALITY CHALLENGE

TIME: 30 Minutes **DELIVERABLE(S):** Brand Attributes

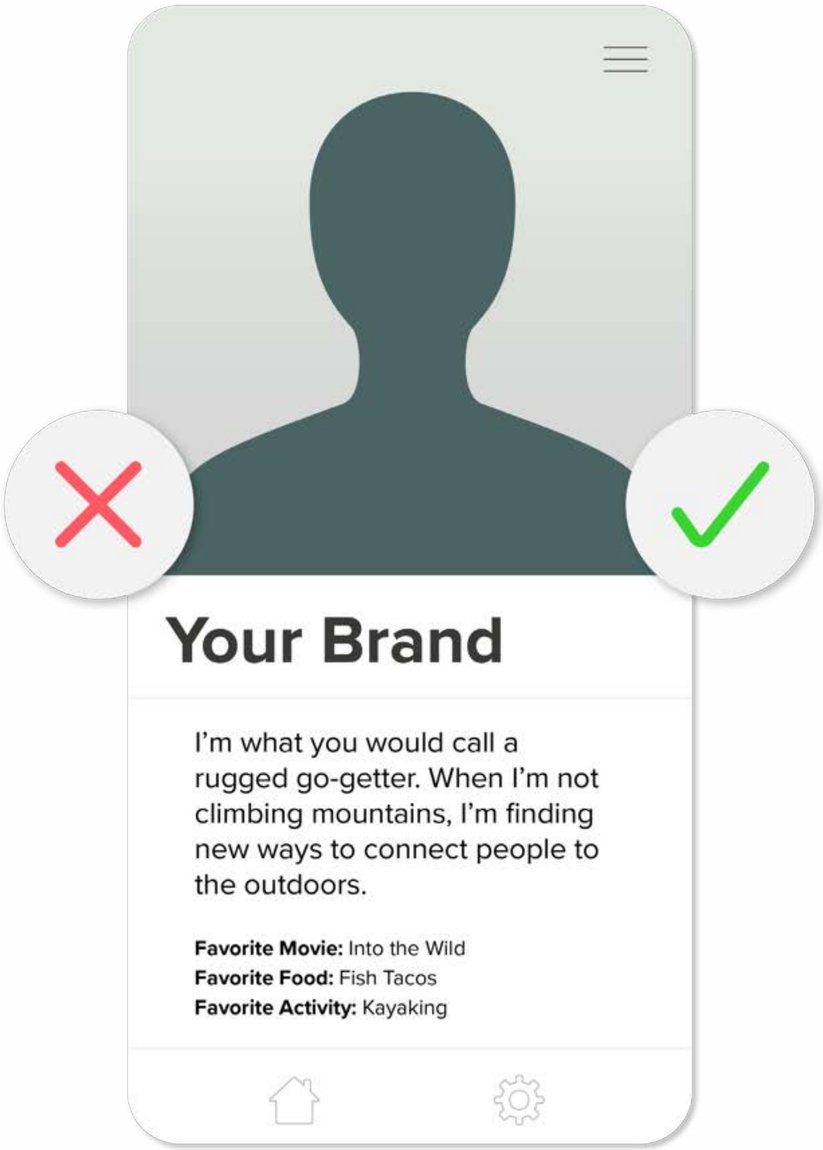
A brand's personality comprises attributes that provide the human element to an identity. It defines how a prospect or what kinds of prospects will ultimately relate to and engage with a brand.

Divide the group into pairs or small groups for 15 minutes and have them describe the brand as if it were a person. Encourage participants to be as detailed as possible and use the following questions to support their brainstorm.

1. If our brand was a person, who would it be?
    a. A supportive wingwoman? A do-it-yourself trailblazer?
2. Who would play it in a movie?
3. How does it talk?
4. How does it sound?
5. What impression does it give off when you meet it?

Regroup and spend the remaining time having the team introduce their personifications to the group.

Once again, have the team identify common trends in the personifications. Then, encourage the group to narrow down to the most appropriate personality traits that will ultimately be woven into their marketing strategy.



Brand Voice Chart

ATTRIBUTE	DESCRIPTION	DO	DON'T
Confident	We are experts in our field and rise to meet any challenge.	• Speak authoritatvely • Introduce new ideas • Be thought leaders	• Be passive/uncertain • Be condescending

EXERCISE #4: THIS, NOT THAT

TIME: 30 Minutes **DELIVERABLE(S):** Brand Voice

This exercise takes brand personality a step further and considers how it translates directly to messaging. In this exercise, the group will define what your brand isn't. The brand is **this**, not **that**.

Have the group consider the personality traits of the brand that they have now defined. It's _____, not _____.

For example, a brand could be **confident**, not **arrogant**. **Funny**, not **childish**.

Have participants use sticky notes to define what the brand is and what the brand isn't.

After 15 minutes of brainstorming, reconvene and share the brand voice chart to assist the group in defining the adjectives that describe the brand's voice and how someone writing for the brand can emulate that adjective — and what they should avoid.

EXERCISE #5: PERCEPTIONS AND ASPIRATIONS

TIME: 30–45 Minutes **DELIVERABLE(S):** Content Strategy Ideas

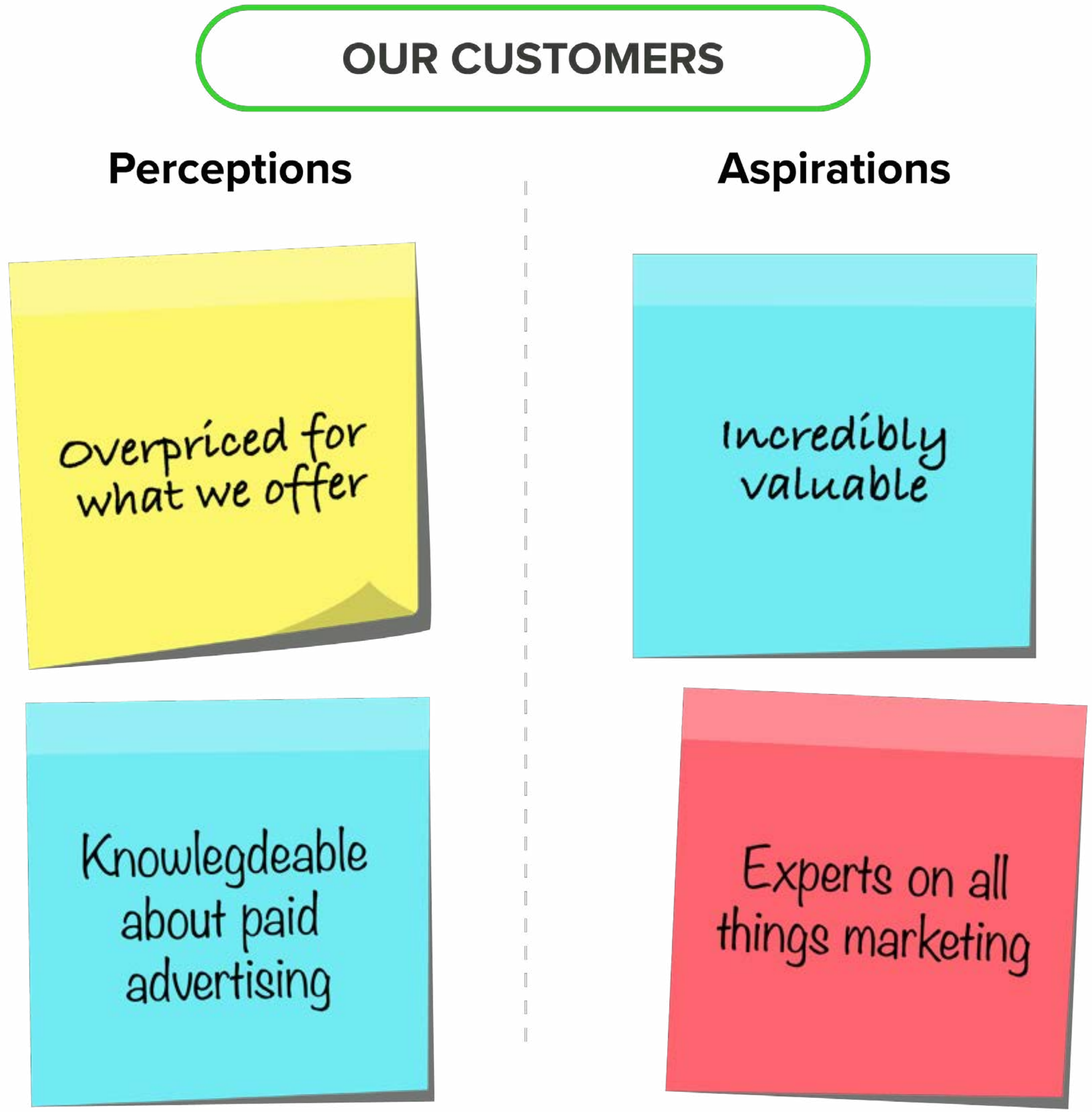
What the brand is now and what the team hopes for it to become will ultimately inform how they talk about it moving forward. The gaps uncovered during this exercise can help the team guide their messaging and the brand as they continue to grow and work toward the newly defined vision.

Have the team list out the audiences whose perspective about the business are valued most on a wall with sticky notes or on a whiteboard. These can be prospects, employees, leadership and others.

Once these audiences have been defined, ask the group the following questions about each of the audiences:

1. How does this audience perceive us now?
2. How do we want them to perceive us 5–10 years from now?

Review the answers as a group and identify the gaps between current perceptions and aspirational perceptions. Ensure the team is aware that filling these gaps should be top-of-mind as they craft content and messaging strategies in the future.



EXERCISE #6: NEXT STEPS

TIME: 15 Minutes **DELIVERABLE(S):** Next Steps

By this point, you've successfully facilitated a brand workshop. Congratulations! The final step is to provide the team with actionable next steps they can take to move forward with a newly established identity.



COMPILE YOUR FINDINGS

Assign someone to compile the findings of this workshop into a finalized document that refines or finalizes the deliverables of this workshop: vision statement, mission statement, messaging pillars, brand voice, etc. Also remember to gather feedback on the finalized pieces from stakeholders and workshop attendees.



CREATE A BRAND STYLE GUIDE

A brand style guide compiles the deliverables of this workshop, along with design assets (logos, colors and fonts) and copywriting style rules to inform anyone who is curating materials for your brand.



ALIGN YOUR ASSETS

Now that you have a finalized brand, make sure the content you have already and what you produce in the future aligns with what you have established in this workshop. This is where your initial content audit comes into play to craft a plan and prioritize the updates of your existing materials.



SHARE WITH YOUR ORGANIZATION

Don't let this be the last time the team talks about the brand! Encourage participants to share the findings of the workshop with the greater organization. The more people you get bought into a brand, the better it can work for your business and contribute to its growth.



BRAND WORKSHOP

PRESENTATION TEMPLATE

The remaining pages in this guide are meant to serve as a template for running a brand workshop for your organization. Each excercise aligns with the instructions in the previous section.

Additionally, certain fields are editable to enable facilitators and notetakers to personalize aspects of the presentation for your organization.



BRAND AND MESSAGING WORKSHOP

PREPARED BY NEW BREED

GUIDELINES BEFORE WE START

In order for you to gain the maximum benefit from our brand workshop, all participants should follow these guidelines.



CHALLENGE RESPECTFULLY

You won't agree with everything you hear. Respectfully challenge the status quo or play devil's advocate when neccessary.



CHECK EGOS AT THE DOOR

Nothing said in a workshop is meant to build up or put down any one aspect of our business — it is the formation of our entire brand.



THINK SIMPLE

Brand workshops work to dilute something very complex and technical into something simple and emotional. Deliverables need to resonate with people who don't do what we do every day.



ASK STUPID QUESTIONS

The best brand workshops thrive on stupid questions. "What do we do?" is not a stupid question. Asking those questions will drive us closer to the most authentic, genuine answer.



PRACTICE DIVERGENT AND CONVERGENT THINKING

With each of these exercises, spend time listening to every idea possible. Grow ideas and don't challenge them. Once everything is in the open, the group can begin to narrow ideas down.



TREAT THIS LIKE A PRODUCT-FREE ZONE

Our product is not the end-all-be-all of what we do. When thinking about our brand, think about the "why" and "how" rather than the technical "what."



PREPARED BY NEW BREED

WARM-UP: 1,000 USES

TIME: 10 Minutes

Divide into pairs or small groups and brainstorm up to 1,000 uses (without repetition) for your assigned item. After five minutes, you will present your tallies and some creative uses to the rest of the team.

CARROT



STAPLER



BROOM





RULER



PAPERCLIP

EXERCISE #1: BRAND PYRAMID

TIME: 60 Minutes **DELIVERABLE(S):** Vision Statement, Mission Statement, Value Proposition

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VISION STATEMENT

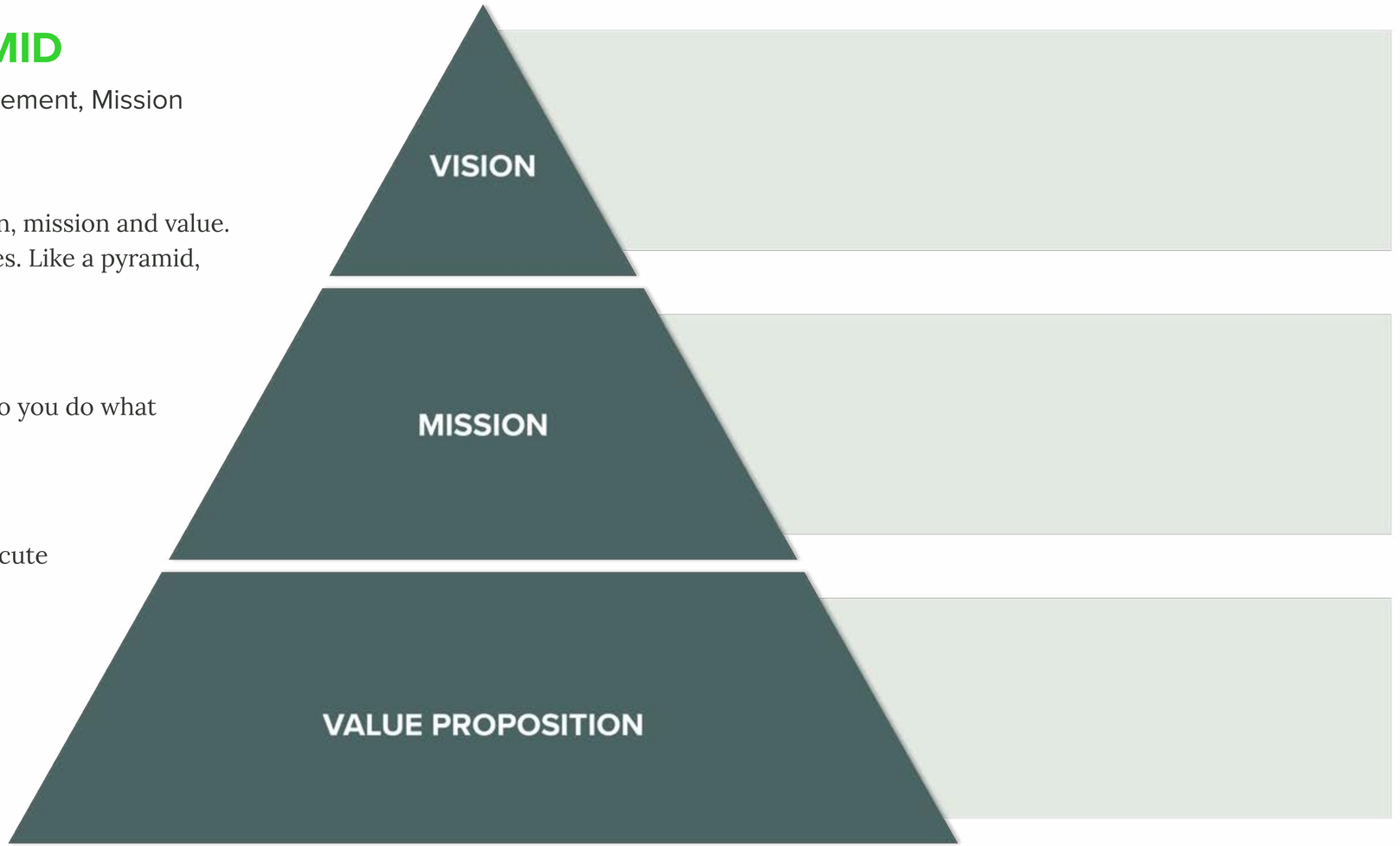
A brand vision is the why behind a business. Why do you do what you do?

MISSION STATEMENT

Your mission statement describes how you will execute on that vision. How do you do it?

VALUE PROPOSITION

The third and final level of a brand pyramid. What sets the organization apart from all of the rest? Why will your organization be the one to accomplish that vision?



VISION STATEMENT

Why were we founded?

Why do we do what we do?

Imagine that in 10 years, a front-page headline is written about our brand. What does the headline say?



MISSION STATEMENT

What do we do?

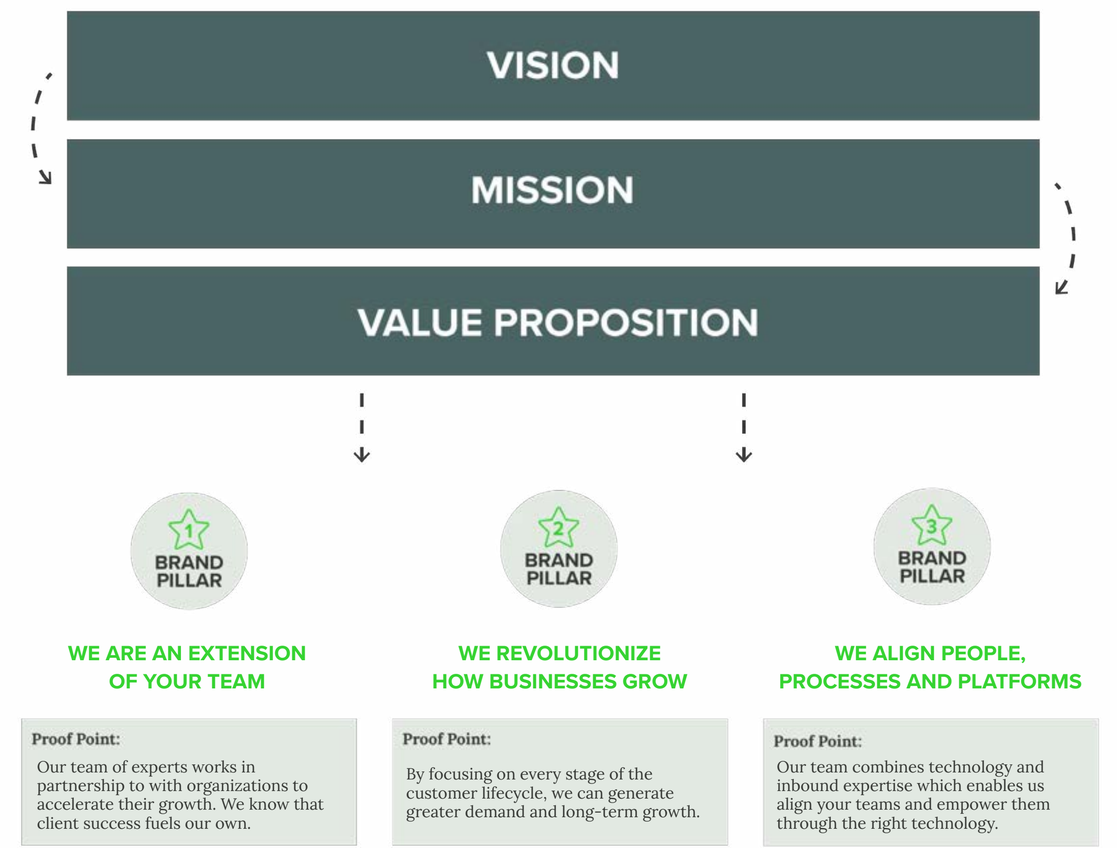
How do we do it?

Who do we do it for?

VALUE PROPOSITION

What do we offer that no one else does?

Why is what we do better than the competition?



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Questions To Think About

1. How would you describe what we do to a seven-year-old?
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1 BRAND PILLAR	2 BRAND PILLAR	3 BRAND PILLAR
Proof Point:	**Proof Point:**	**Proof Point:**
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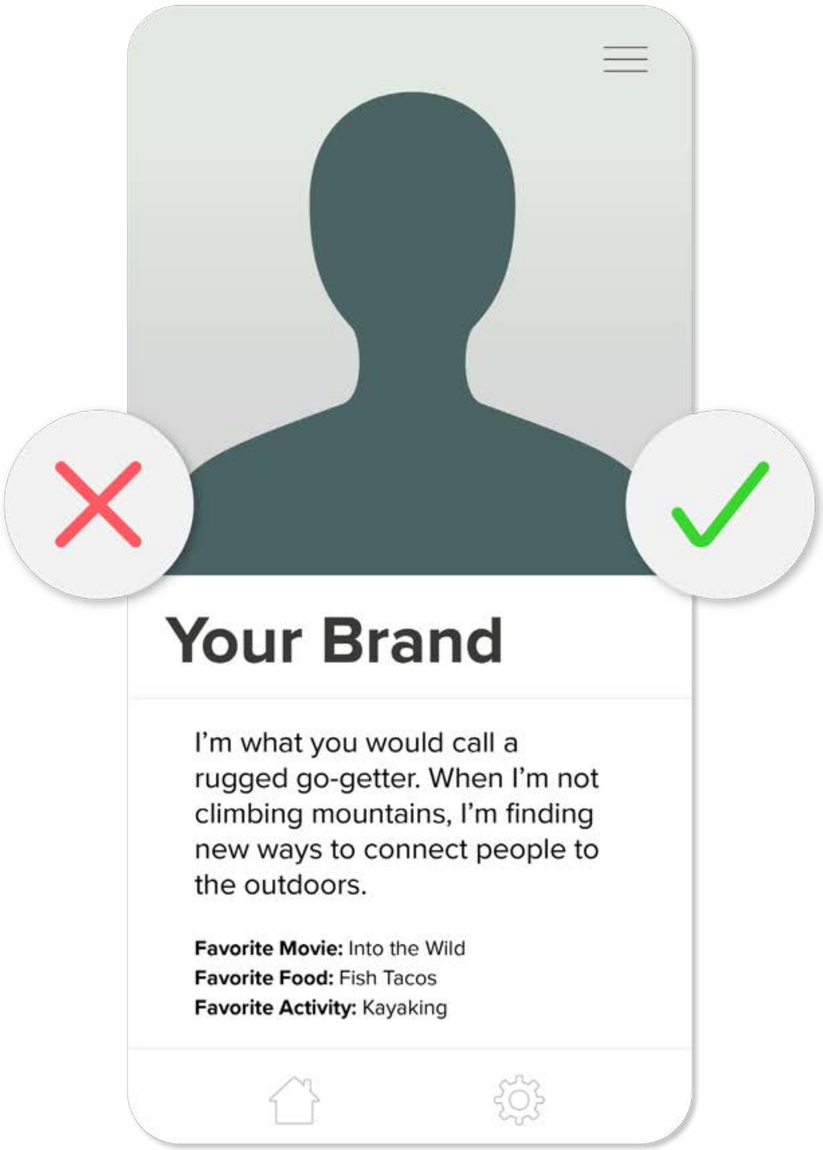
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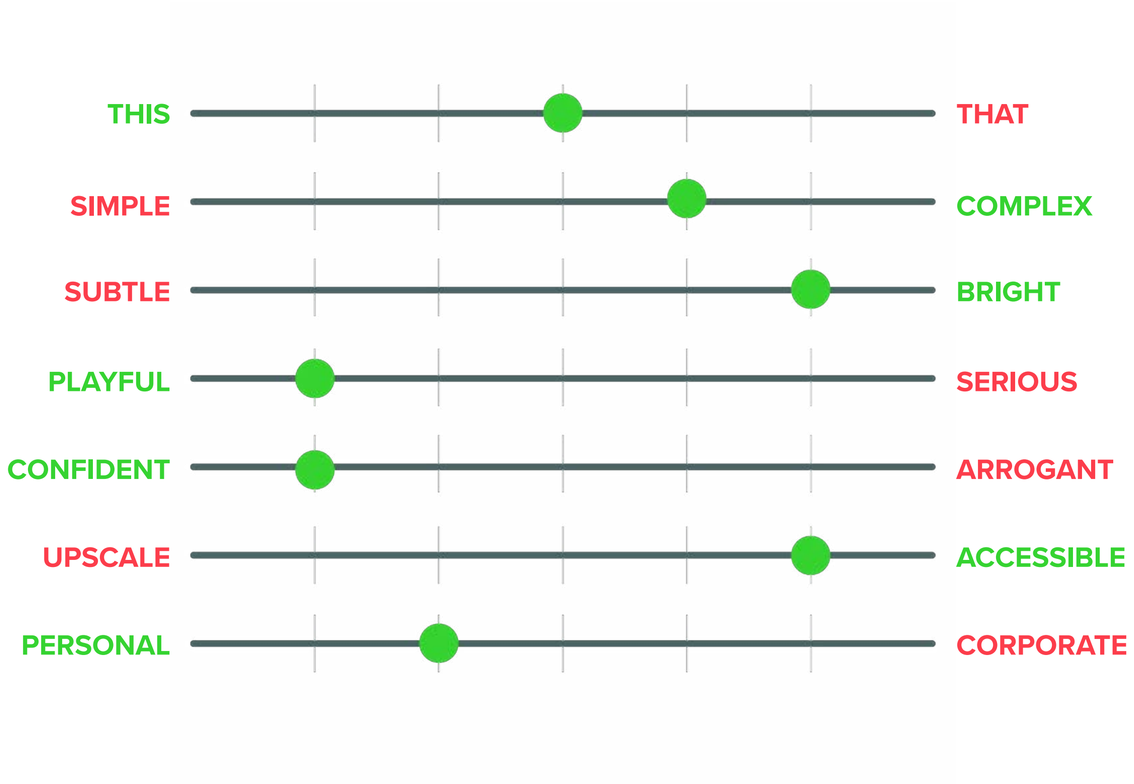
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Have the group consider the personality traits of the brand that they have now defined. It's _____, not _____.

For example, a brand could be **confident**, not **arrogant**. **Funny**, not **childish**.

Have participants use sticky notes to define what the brand is and what the brand isn't.

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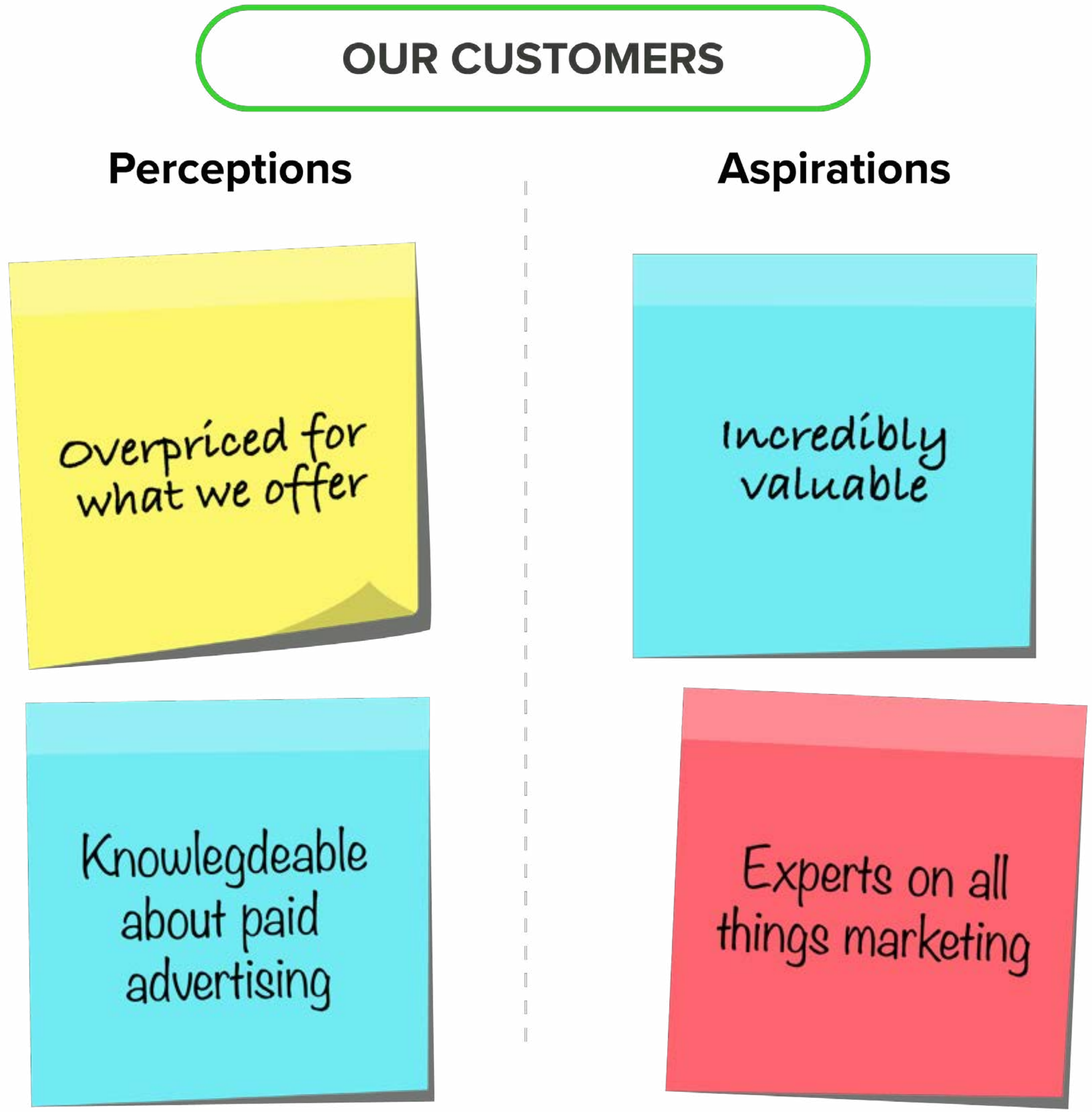
EXERCISE #5: PERCEPTIONS AND ASPIRATIONS

TIME: 30–45 Minutes **DELIVERABLE(S):** Content Strategy Ideas

What the brand is now and what you hope for it to become will ultimately inform how you talk about it moving forward. The gaps uncovered during this exercise can help you guide your messaging to reach those aspirations.

Questions To Think About:

1. What audiences are most important to our brand?
2. How does this audience perceive us now?
3. How do we want them to perceive us 5–10 years from now?



CONGRATULATIONS, YOU'VE SUCCESSFULLY COMPLETED YOUR BRAND WORKSHOP! HERE ARE SOME NEXT STEPS TO CONSIDER:



COMPILE YOUR FINDINGS

Assign someone to compile the findings of this workshop into a finalized document that refines or finalizes the deliverables of this workshop: vision statement, mission statement, messaging pillars, brand voice, etc. Also remember to gather feedback on the finalized pieces from stakeholders and workshop attendees.



ALIGN YOUR ASSETS

Now that you have a finalized brand, make sure the content you have already and what you produce in the future aligns with what you have established in this workshop. This is where your initial content audit comes into play to craft a plan and prioritize the updates of your existing materials.



CREATE A BRAND STYLE GUIDE

A brand style guide compiles the deliverables of this workshop, along with design assets (logos, colors and fonts) and copywriting style rules to inform anyone who is curating materials for your brand.



SHARE WITH YOUR ORGANIZATION

Don't let this be the last time the team talks about the brand! Encourage participants to share the findings of the workshop with the greater organization. The more people you get bought into a brand, the better it can work for your business and contribute to its growth.

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