

ACTION PLAN AND BEST PRACTICES

Building Your Brand Strategy

A strong brand identity can help you differentiate your business from your competitors. Use this worksheet to find ways to integrate your brand identity into all aspects of your business, then create a plan to make the short-term and long-term changes you need to get you there. To see an example, please refer to the “Case Study” document at chase.com/Coaching.

Brand integration worksheet

| Category | How does this reinforce my brand? | What can I do differently/better? | Priority |
|------------------------|-----------------------------------|-----------------------------------|-----------------------|
| Products | | | High Medium Low |
| Logo and/or tagline | | | High Medium Low |
| Sales/staff | | | High Medium Low |
| Brick-and-mortar store | | | High Medium Low |
| Website | | | High Medium Low |
| Services/policies | | | High Medium Low |
| Social media | | | High Medium Low |
| Marketing | | | High Medium Low |

Best practices

Your brand establishes the foundation for your business strategy and sets the tone for everything you do. Your business decisions should be anchored around a consistent theme that is reflected in all customer touchpoints. Ensure branding is focused on both internal and external areas, so that you align what you say with what you do.

Products: Analyze existing competition and compare offerings, including their quality. Identify and articulate what is unique about your business and what you do better than the rest. Continue to evaluate the competitive landscape, particularly when new products, services or competitors enter the market.

Logo and/or tagline: To build brand awareness, consider including a logo in visual elements when marketing your business. Backed by a strong brand, logos can also instill an emotional connection with customers. Seek opportunities to add logos by reviewing work attire, sales materials, packaging, merchandising, websites, blogs, social media, events, flyers, business cards, vehicles, etc.


Sales: Customer interactions with frontline employees have a strong impact on your brand. Provide routine brand awareness training with your sales team and coach them to confidently articulate your brand story.

 **Idea:** *Provide bite-sized talking points, infographics or one-pagers to remind employees of the brand.*


Staff: Employees can be your best brand ambassadors. Recruit people whose values align with your brand. Communicate your brand identity during initial interviews and reinforce during onboarding for clarity and consistency.

Brick-and-mortar store: You should reflect your brand in your physical space and with all personal interactions and touchpoints. You can deliver a customer experience that aligns with your brand through décor, styling and even scent.

Website: Your website puts a face and story to your brand, while building credibility and trust. Audit your website for brand personality and tone across your website's images, design and copy.

 **Idea:** *Place special focus on showcasing the brand values on the landing and "About Us" pages.*

Services/policies: Your services tell your customers what to expect from your brand. Be clear about your offerings, anticipate customer needs and make an effort to provide moments of delight. This is an area where you can affect your customers on an emotional level. Also, make a point to align operation practices to your stated brand values.

 **Idea:** *Align operation practices to your stated brand values (i.e. if your brand personality is about helpful and friendly service, your return policies should be flexible).*

Social media: Your social media activity affects how people view your brand. Boost brand awareness by using the appropriate social media platforms for your brand. Posting content featuring consistent visuals (color, font, style), brand personality and messaging will funnel traffic that helps increase leads and sales.

Marketing: In all communications, maintain a defined brand personality to drive a consistent voice, tone and messaging. This consistency will help create emotional connections to your brand, driving loyalty and sales.

For informational/educational purposes only: Views and strategies described may not be appropriate for everyone and are not intended as specific advice/recommendation for any individual. Information has been obtained from sources believed to be reliable, but JPMorgan Chase & Co. or its affiliates and/or subsidiaries do not warrant its completeness or accuracy. You should carefully consider your needs and objectives before making any decisions and consult the appropriate professional(s). Outlooks and past performance are not guarantees of future results. ©2023 JPMorgan Chase & Co.