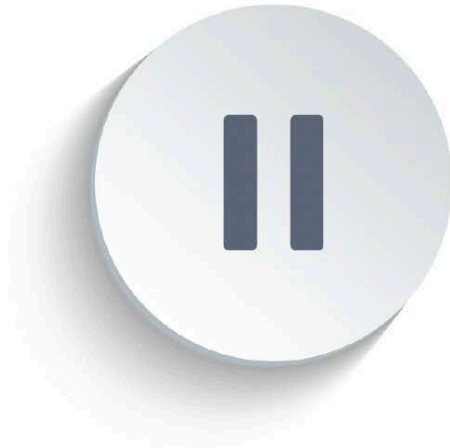


# BEFORE YOU MARKET



Discover how a brand-first  
approach could revolutionize  
your marketing

Written by  
Matthew Christ and Orsolya Herbein

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# **Before You Market**

Discover How a  
Brand-First Approach  
Could Revolutionize Your Marketing.

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Dedication

*"All Glory to God who is continually teaching us by the opportunity to serve many wonderful clients."*

## Preface

A national brand image that is clean, clear, and measurable is a result of creative skills working through a solid brand strategy. You don't have to be a national company to look like one. Probably the best way to see this difference is to drive down main street USA and observe the many signs and images that scream for your attention. It's easy to see noisy local brands, most of them your mind will instantly tune out, versus the clarity presented by a national brand.

Sure, national brands will always outspend local brands regarding tactical marketing dollars. That is not the point. When local brands show up with the clarity of a national brand, they gain consumer trust and confidence. Knowing your unique brand strategy is the starting point. For every marketing communication function, it must be linked to this strategy, or it will produce noise.

## **So why is it hard?**

First, the difficulty is linked to our God-given natural abilities to create. Most business owners and the resources they deploy possess the desire to change things based on visionary ambitions and creative expression. Reasonably stated, business owners expect their new website designer or graphics person to transform their vision.

So what's the problem? Let's say you are designing a new website. You meet with the design team and tell them everything you want the site to do and say. After what usually takes a couple (sometimes many) rounds of revisions, you finally see something you like. It expresses your vision and presents how your product or service is best, better, and different. You love it. The designer is happy. Here is what's wrong with that process.

Chances are the image and messaging will not attract what matters most; your ideal customer. The designer has created something that is a reflection of their creative talent but is not based on strategy, therefore not connecting with your market. The finished product is usually

filled with too many words and images, as a result creating a lot of unnecessary noise.

This lack of clarity causes higher bounce rates on your website, lowers marketing conversion, and will waste a large percentage of your marketing dollars. National brands take the time to build a solid strategy. Many of the principles and exercises in this book will guide you to think about the strategic steps necessary to experience the right way to market.

We wrote this book because being in business is hard. And wasting money on ineffective marketing is causing unnecessary hardship for many small businesses today.

Our vision is to see a million business owners of every size and industry to get empowered by the right way to market, *BEFORE THEY MARKET.*

## PREFACE

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## Introduction

Too many small business owners struggle with effective marketing.

Worse yet, the most common reason for the struggle is often buried deep and overlooked, resulting in a tremendous amount of wasted time, money, and opportunity.

If you are frustrated by the return on investment (ROI) you're getting on your marketing dollars, then this book is for you.

After decades of working with businesses like yours, it's clear to the two of us that the issue we've identified cuts to the heart of every challenge you face. To help you understand it, we'd like to introduce you to Peter.

**"I'm Sorry, Peter. We Won't Do It."**

We met Peter, the owner of a local landscaping company, in the summer of 2017. He was looking to get more customers through the door, and he had the solution: spending a hefty chunk of money to place a full-color (read: expensive) ad in a high-end local magazine. Peter had heard our reputation for creating excellent work and wanted us to create the ad.

"I'm after an elite market," Peter told us. "I build top-quality swimming pools and outdoor kitchens. Sure, the ad will be expensive, but it's a really nice magazine!"

Besides, the media rep said if I get the ad to him next week, he can push it out in the next issue. Can you guys help?"

Matt, our brand strategist, looked him straight in the eye and said, "I'm sorry, Peter. We won't do it."

Peter was aghast. "You won't? Why not?"

"Simple," Matt replied. "It won't work."

"What do you mean, it won't work? How do you know?" Peter asked, clearly astonished.

"Three reasons," Matt explained. "First, your business name is Woodfield Landscaping. It doesn't say a thing about high-end swimming pools or outdoor kitchens. Second, your logo is just the word 'Woodfield' on a leaf.

And third, you're pursuing an elite market."

"What does my logo have to do with anything? What's your point?" Peter demanded.

"The problem" Matt explained, "is your elite market won't respond to this ad because, frankly, there's



FIGURE 1.1

nothing elite about your brand. Look at your logo, which is simply your name (Woodfield) superimposed on a leaf. That doesn't look elite or professional at all. In fact, it screams 'local landscaper.' If you want to connect with your ideal customer, someone who's used to buying brands like BMW, Rolex, and Prada, then we need your brand to project elegance and luxury. What you have now makes people think of crews laying sod and planting shrubbery, not someone who builds and designs high-end swimming pools and luxurious outdoor living spaces."

"Oh," Peter said, still caught off guard. He thought for a moment, then replied, "Could we put a photo of one of my pools in the ad? We build gorgeous pools! Look at some of the samples on our website."



Matt pulled up Woodfield's homepage. The pools were indeed beautiful, if and when you could see them. The photos were low resolution, and some of them were even blurry. The site's overall design looked dated and tired. There was too much copy and no clear message pulling it together.

Matt shook his head. "I can't in good conscience waste your hard-earned money on an expensive ad that won't work." Now Peter was beyond crestfallen. "But," Matt said with a smile, "we can do something else."

Peter brightened immediately. "What's that?" he asked.

"We can fix your brand," Matt replied. "We can help you align your brand with what your customers need and desire. Once we've done that, then we can run your ad."

“You told us on the phone you had a marketing problem,” Matt continued, “and you were right. But you won’t solve the problem by switching tactics or media. You need to create a strong brand identity first, one that looks like it belongs in the same world as the luxury brands your customers are familiar with. You have to communicate clearly that you’re an elite company that serves an elite market.”

Peter nodded, then replied, “I never thought about it like that. You’re right, though. It makes perfect sense. Could you give me a proposal?”

### **Before You Market, Fix the Brand**

As it turned out, what Peter thought was a marketing problem was actually a branding problem, and he’s not alone in that misconception.

Over the years, we've seen a parade of small business owners who threw incredible amounts of money at various marketing tactics but never saw the return they deserved. After each failure, they'd turn to another tactic, invest more, and lose again.

Sound familiar?

These businesses never gained traction because they weren't looking at the root cause of their problem. The problem was their brand strategy or, more specifically, the lack thereof.

A clear brand that aligns with your customers' needs and desires must be the foundation of your marketing efforts. Without it, there's no compass to guide you,

and your efforts will be largely wasted on marketing that runs off course and fails to connect with those you want as customers.

**Branding is the essential starting point for every marketing campaign, and a clear brand that connects with the right audience is attainable by businesses of every size.**

Although you may have thought you'd picked up a marketing book, you're actually holding a branding book! Simply put, strategic branding makes marketing more effective. Our business exists to help business owners rethink marketing by clarifying their brand's message and image **before they market.**

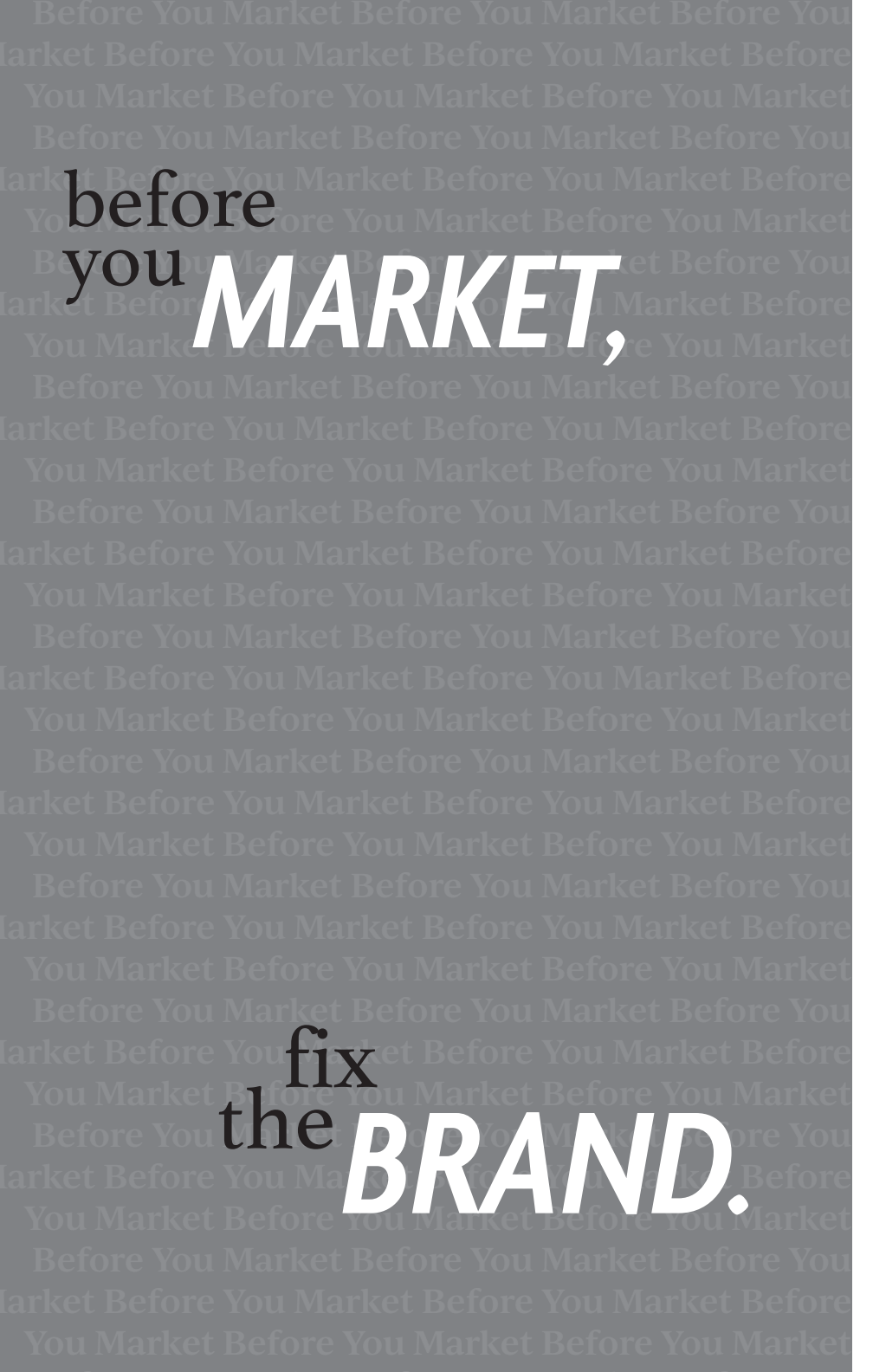
## **Here's our promise to you.**

If you employ the principles in this book, you'll be able to engage the right customers and get the results you've been looking for:

- More qualified leads
- Reduced costs
- Better returns on your marketing investment

If that sounds good to you, read on!

As you are reading through this book, we will often ask you to pause and reflect. Have a pen and notebook ready to help you jot down ideas and thoughts as you follow along. To access the worksheets we reference in this book, visit **[beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)**



before  
you **MARKET,**

fix  
the **BRAND.**

CHAPTER 1

# Defining the Small Business Brand

Branding is misunderstood.

In this chapter, we'll look at some common myths about branding so we can sort out the noise and find the definition that's most helpful to you as a small business owner. With those myths debunked, you can form a clearer understanding of what branding truly means and how it impacts your business. Then, we'll demonstrate the relationship between branding and marketing and outline the necessity for a brand-first approach. Let's dive in!



## Six Myths about Branding

### **Myth #1: I don't need a brand. I need marketing.**

Most small business owners dive into marketing without ever considering their brand. Like Peter, they spend thousands of marketing dollars, for which they get few or no results, and nevertheless remain convinced that the pain they feel is the result of a marketing problem.

It may take a long time (and a lot of wasted money) before a business owner realizes that it's not enough to just switch marketing tactics. Strategic branding will give you the clarity you need to demonstrate the value of your business to the market.

We have seen a tremendous increase in marketing results, just by fixing the brand. **The sooner you invest in brand clarity, the sooner you will realize your desired returns on marketing.**

**Myth #2: Branding is only for the big guys.**

We've lost count of the number of times we've heard this one. So many small business owners are convinced that branding is for big companies only and so expensive there's no way they can afford it.

Actually, the reverse is true: you can't afford to be without brand strategy.

To be sure, branding isn't cheap, but wasting money year after year on ineffective marketing is far more expensive.

Beyond the money that's wasted, the amount of time and opportunity lost along the way is incalculable.

That's what inspired this book. We'll help you completely rethink your marketing by showing you how to build your brand image, your customer recognition, and most importantly, your bottom line.

Regardless of your budget, any small business can easily and inexpensively implement the core principles of branding outlined in this book.

### **Worksheet 1.1: What Is a Brand?**

To dig deeper, download a fillable PDF with our "What Is a Brand?" exercise. To access our worksheets, visit [\*\*beforeyoumarket.com/tools\*\*](http://beforeyoumarket.com/tools)

**Myth #3: My brand is my name and logo.**

That's a little like saying "My car is the engine, the drive train, and the wheels." It's true, they're important and you won't get anywhere without them. But they're only part of the bigger picture. A brand often includes a logo, fonts, color schemes, and symbols to represent what the company or product is all about. The American Marketing Association (AMA) defines branding this way: "A name, term, design, symbol, or any other feature that identifies one seller's good or service as distinct from those of other sellers." Frankly, we've got a few bones to pick with the AMA's definition because it's simply incomplete.

Your business's name and logo (also known as your identity) are part of your brand, but neither are where your brand begins or ends.

Certainly, your business's identity (name and logo) is often the first way in which people experience your business, so you will need to choose them carefully. As a result, there are some very important steps you should take before making that decision. (We will talk more about this in more detail later in this book.)

Your business's name and logo—your business's identity—are critical, but it takes much more than a name and a logo to create an effective, successful brand.

### **Worksheet 1.2: What Do Your Name and Logo Say?**

To dig deeper, download a fillable PDF with our "What Do Your Name and Logo Say?" exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

**Myth #4: Branding is the same as marketing.**

Branding and marketing are closely linked, making this a common misconception. Here are the differences:

1. Brand is what your business is about.
2. Marketing is the way you get your brand in front of your audience.

In other words, marketing is the way you nurture the relationship between your brand and your audience.

Marketing plays a key role in building awareness of your brand, but the true purpose of marketing is to

create awareness and to generate qualified leads for your business. Success in marketing also depends on your brand because it relies on how well-defined your brand is.

In the end, the difference between branding and marketing is found in their different functions. *Brand* defines your identity; *marketing* expresses it. Put simply, if your brand isn't aligned with your customers' needs and desires, the expression of that brand will fail to connect with customers.

### **Worksheet 1.3: Marketing Self-Assessment**

To dig deeper, download a fillable PDF with our "Marketing Self-Assessment" exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

**Myth #5: I don't need branding—yet.**

We hear this from lots of business owners, from start-ups on up, who have been told they need a brand and fully intend to get one, someday. Once they've gotten the business off the ground, once they've made back some of their investment, once they're able to pay themselves and not just the bank, once they've had time to think about what their brand should be. Here's what we tell them:

Would you start building a tower on the second floor? Of course not. In order for your tower to stand, the first thing you need is a strong foundation.



## WOULD YOU START BUILDING A TOWER ON THE SECOND FLOOR?

In order for your tower to stand, the first thing you need is a solid and strong foundation.



FIGURE 2.1

That's where branding comes into building a business. If you skip over branding and go straight to marketing, your marketing will not be able to generate the results you need to return your investment. You need a basic brand strategy from the beginning; one that speaks clearly to your market. Then, as the business grows, you can adapt it to your vision and goals.

### **Worksheet 1.4: Brand Self-Assessment**

To dig deeper, download a fillable PDF with our "Brand Self-Assessment" exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

## **Myth #6: My “why” is my brand.**

Of all the myths we’ve listed here, this one comes closest to the truth. Nevertheless, your “why” by itself is not your brand.

Simon Sinek described it best in his revolutionary book *Start with Why: How Great Leaders Inspire Everyone to Take Action*. He pushed beyond merely describing features and benefits. Instead, he cited aspirational values as the true drivers of a purchase. “People don’t buy WHAT you do,” Sinek stated, “they buy WHY you do it.”

Finding your “why” is certainly important, but “why” doesn’t cover other aspects of your brand: your message, your image, and your promise to your customers. Your “why” is an internal baseline that guides your vision. It is not your brand.

### **Worksheet 1.5: What’s the “Why”?**

To dig deeper, download a fillable PDF with our “What’s the ‘Why’” exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

## Why Branding Matters

So far, we've looked at what a brand is not. Now, let's look at what it is. Put simply, **your brand is connected to every part of your business.**

Up to this point, we've been unpacking the connection between branding and marketing. It's critical to understand that if your business is to truly succeed, your brand needs to guide every aspect of the business.

That's why we believe that every Marketing Growth Plan needs to strategically align brand, marketing and experience.



FIGURE 2.2

Far too many businesses lack a clear brand, meaning they market from a shaky foundation. Even those businesses with a brand often fail to apply the core concepts of their brand to their customer experience. When you apply the core concepts of your brand to your customer experience, you live up to the promises you've made and your marketing message truly begins to take hold. That's when loyalty is won your customers become more than just customers: they become advocates for your brand.

Your brand will change more than the way you market: it will change the way you do business. Although change is never easy, changing the way you do business will earn you the trust needed to grow your business. A clear brand shapes the way people see and relate to you.

Here's the one definition of branding that is most helpful to a small business owner: Branding is actually something your business already has.

You may be wondering: how that can be, when I've never thought about branding or invested in it. The answer is quite simple. Your brand is what your audience thinks about your business.

For a small business owner, branding is best described as a **perception**. It's the sum total of your audience's opinions, feelings, actions, and experiences: good, bad or indifferent, about your business.

Consider Fallon McElligott Rice's breakthrough campaign in the 1980s for Rolling Stone. In one ad,



the left-hand page of the two-page spread featured a Volkswagen bus painted in psychedelic designs. Above it was the one-word headline "Perception." The right-hand page featured an expensive two-door sports car under the headline "Reality."



FIGURE 2.3

The message was unmistakable. Advertising media buyers viewed Rolling Stone readers as a bunch of impoverished hippies, but these were actually affluent readers who spent more than \$13 billion a year on retail alone. In its first year, the ad campaign raised media buys by nearly 50 percent.\* That's the true power of branding. In the same way, your brand needs to shape the way your market looks at you, especially if that perception is inaccurate. Because brand is a perception, you can't afford any gaps or cracks in it. In shaping that perception, you can be deliberate and specific. **Your brand must lead more than just your marketing. It must lead your sales efforts, your hiring, your work culture, and the very experience you deliver to your customers.**

### **Worksheet 1.6: Looking In from the Outside**

To dig deeper, download a fillable PDF with our "Looking In from the Outside" exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

Bottom line: A clear brand aligns with your audience's wants and desires.

Great brands often inspire and transform the buyer, despite having little to do with the actual features and benefits of the product or service. Many great brands are open-ended and aspirational. For example, Nike urges you to "Just do it." According to that message, it doesn't matter what you do, or what activity you participate in, as long as you just get out there and do "it."

For years, Apple used "Think different." That line emphasized Apple's difference from the personal computer and defined the Apple buyer as someone smart, creative, and willing to break away from the crowd.

Notice, too, what these companies don't say: nothing about running shoes or tennis rackets, nothing about processing speeds or operating systems. Nike and Apple connect to their ideal consumers' desires on a deeper level, whether it's improving athletic performance or finding a phone or computer that matches their maverick personalities.

Your brand's positioning should always be centered around what your market desires. Too often we craft our messages around the wonderful things our businesses do but fail to connect with the thing our customers want.

### **Worksheet 1.7: What's the "Want"**

To dig deeper, download a fillable PDF with our "What's the 'Want'" exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

## **A clear brand makes a clear promise.**

The goal of every brand should be to communicate the specific value your business brings to your ideal customer through a clear, simple message and image. In other words, great brands clearly define how they make a difference in the lives of their customers. This is your “brand promise.”

A brand promise is a short statement that speaks to the value the business delivers in the most concise way possible. It is a promise meant to be kept, and everything gets compared to it. Business development ideas that don't uphold this promise are a waste of time; every idea that does should be deeply explored.

## YOUR BRAND PROMISE HAS GREAT POWER.

When you actually align your client or customer's experience with the promise you've made to them, the power of a well-defined brand truly kicks in. Don't break your promise!



FIGURE 2.4

For example, our business promises clients that we will show them “the right way to market.” If that’s not the experience they walk away with, then we’ve failed them.

Here’s the brand promise that Woodfield Outdoors developed: “We excite every customer with exceptional outdoor living experiences.” That was shortened to become their tagline, *Exceptional Outdoor Living*. We’ll show you how they got there in a later chapter.

Every employee should memorize and keep this promise to your customers. If not, your customer experience will surely suffer. **The brand promise is a compass that keeps everyone aligned in the same direction.**

Your brand promise has great power. When you actually align your client or customer's experience with the promise you've made to them, the power of a well-defined brand truly kicks in.

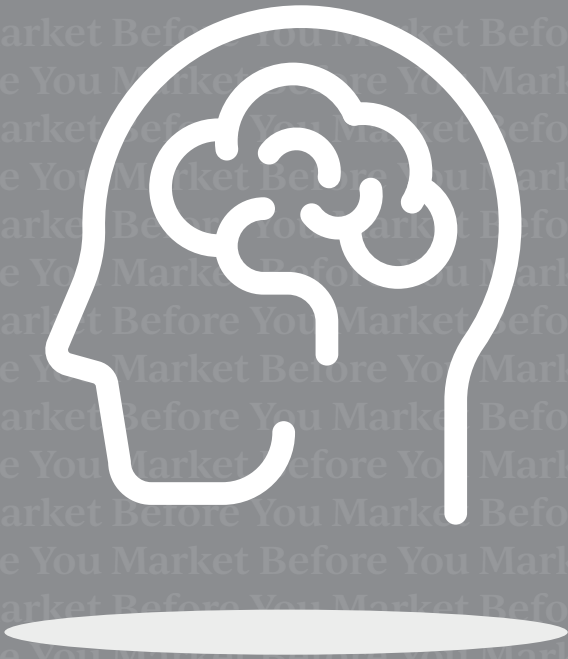
As we've observed, your brand is a perception: the images and ideas that come to mind when a consumer thinks about your business. When those images and ideas are consistent, your brand's statements can send powerful messages straight to your audience's hearts and minds.

John Hegarty, of the legendary London agency Bartle, Bogle & Hegarty, put it perfectly in his book *Hegarty on Advertising*. "A brand is the most valuable piece of real estate in the world: a corner of someone's mind."

### **Worksheet 1.8: Brand Promise Brainstorm**

To dig deeper, download a fillable PDF with our "Brand Promise Brainstorm" exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)





# BRAND

is the most **VALUABLE**  
piece of **REAL ESTATE**  
in the world: a **CORNER**  
of someone's mind.

Once a brand occupies that mental real estate, it includes the feelings that are triggered when someone thinks about your company.

Those feelings can be influenced by every aspect of your brand, including:

- Your packaging and other visual representations,
- The clarity of your message,
- The quality of your products and services,
- Your website (both its design and ease of use),
- The way you serve your customers, and
- Your support of a social cause.

**Your brand must be communicated clearly and consistently at every one of these points.** It must be consistent across your branding, marketing, and customer experience. It takes only one mistake, anywhere along the line, to make a negative impression and lose a customer forever.

Worse yet, one misguided social media post or one misunderstanding with a customer can quickly spiral out of control online, tarnishing your brand. As Benjamin Franklin once said, "It takes many good deeds to build a reputation, and only one bad one to lose it." Rest assured, however, if every impression you make is positive and makes your customers feel good, you'll develop a loyal following built by word of mouth, and that's the most powerful endorsement of all.

### **Worksheet 1.9: Consistency**

To dig deeper, download a fillable PDF with our "Consistency" exercise. To access our worksheets, visit [beforeyoumarket.com/tools](http://beforeyoumarket.com/tools)

Here's the bottom line: a clear brand shapes the market's perception of your business.

Your brand is more than just the product or service you provide. It's a **perception**. When you are clear on who you are, what you offer, and who your ideal market is, you can:

1. **Align your brand** with your audience's wants and desires,
2. **Create a promise** to define what direct value you bring to them, and
3. **Consistently deliver on that promise** in every interaction you have with them, both in your marketing and in the customer experience.

### **Worksheet 1.10: Brand Perception**

To dig deeper, download a fillable PDF with our "Brand Perception" exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

When those three strategies are in play, you'll finally be empowered to deliberately shape and strengthen how the market perceives you.

### **How Branding and Marketing Work Together**

Through every point of contact with those you serve, your brand builds trust and develops relationships. Marketing has a narrower focus. Marketing, the means by which you introduce your brand, strives to attract new customers by communicating your brand.

For this introduction to be effective, the marketing of your brand must speak to the needs and desires of your audience, and the two must align.



FIGURE 2.5

Once you attract new customers with marketing that speaks to them, encountering a brand that doesn't match other areas of your business, like customer experience or the product or service itself, leaves them confused. **Confusion can damage the opportunity to develop a relationship with them, and we often don't get a second chance.**

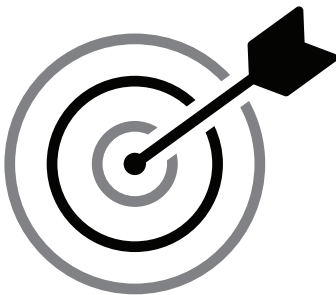
When your brand and marketing both align and speak to the needs and desires of your audience:

- You control how you are known in the market.
- Your marketing generates more qualified leads and fewer dead ends, and
- You reach your ideal customers more often.

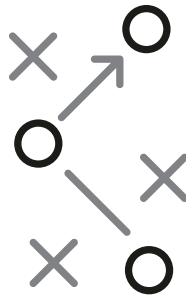


## The two types of marketing and the challenges they pose for brand alignment

There are two types of marketing: **strategic** and **tactical**.



Strategic  
Marketing



Tactical  
Marketing

FIGURE 2.6

**Strategic** marketing, as the phrase suggests, refers to your strategy for introducing your brand to your ideal customers. Your strategy should reflect a deep understanding of your market segments and the ideal customer within each segment. For example, if you sell products that help seniors stay in their homes longer, then your target audience includes both seniors and their adult children.

Those two segments have very different priorities, needs, and desires, and you will need different marketing strategies to reach each of them. Keep in mind what we have already discussed: the messages for both of those segments must align with your brand! You must make sure that you don't make it seem as though there are two different brands within your business.

**Tactical** marketing, as the phrase suggests, refers to the actual tools and tactics you use to promote your brand. These tactics can include both digital and traditional marketing tools, such as:

- Your website
- SEO or search engine optimization
- Social media channels
- Email marketing
- Television ads
- Radio ads
- Billboards
- Print advertising
- Direct mail

That's far from a complete list, but it's already easy to see the chaos that can result when there is no established brand to keep all of these tools in alignment. When the visuals aren't aligned, the brand is unrecognizable. This is especially problematic, given that the customer must encounter your brand an average of eight times before remembering and recognizing it.

The same is true of words. Marketing is an exercise in memorization. If you aren't sharing the same message consistently, people will never learn it.

Worse yet, visuals and messaging that shift between tactics causes confusion and short-circuits the trust

you're trying to establish with your ideal customer. A consumer who clicks on a killer ad but lands on a dated, poorly defined website, will lose trust and interest in the brand. When a compelling radio ad promises great customer service as a key component of your brand but your team doesn't deliver, trust is broken and another sale is lost.

**For your business to succeed,**

1. It must be **remembered, and**
2. It must be **trusted.**

Unless your brand consistently aligns with every marketing tool and tactic you deploy, confusion will block your path to success at every turn.

## The Brand-First Approach

Because branding is the foundation, **it must come first**, before any thoughts of marketing.

Whether you're a startup, an established company or a company in the midst of change, **it's critical that you clearly define who you are as a brand before you start spending money on marketing.**

Ultimately, your brand is what attracts customers to you and keeps them coming back for more. Brand loyalty is what gets customers to recommend you to friends, family, and co-workers. Marketing methods, tactics and trends may change, but **your brand remains the same.** Even if you adjust your brand to include or exclude products or services, its core values

and promise should remain the solid foundation on which those adjustments are made.

### **A strong brand communicates quality**

Because brand is a perception, it has the power to create **trust**. A big part of that power, and a major driver of engagement, comes from the perception of quality. Imagine your car breaks down in the middle of nowhere. You need a repair shop, so you pull out your phone and find two results nearby.

Both companies have 4.5-star customer ratings and, according to their reviews, are run by great people who do excellent work. They're both locally run businesses and are roughly the same size.

One company's logo looks dated, blurry, and could have been hand-drawn in someone's basement. When you click to their website, you see lots of text; the few visuals they have are small amateurish images with bad lighting. With so much text to read you become confused; the poor-quality visuals leave questions in your mind about the experience you might have with them. (And let's be honest, when it comes to auto repair, trust is already hard to win!)

The other company feels like a national brand. Their logo looks clean and professional. Their website is highly visual, and they speak right to your needs and desires with a tight, targeted headline and short, disciplined bits of text.

Which company will you call? Likely the latter.





FIGURE 2.7

**Your business deserves to present itself like a national brand, and it needs to.** National brands establish a standard for image quality with clean lines, easy-to-read typography, and a limited color palette that helps create recognition and trust.

Now that you understand the importance of branding and how it helps your business achieve national brand quality, we can explore steps to building a solid brand foundation in the next chapter.

there is *a right* <sup>to</sup> **market.**  
*way*

CHAPTER 2

## **Five Steps to Building a Solid Brand Foundation**

Marketing your business effectively today is far different from what would have worked even a few years ago. Young entrepreneurs are flooding into the business arena, as boomer-generation owners are heading for the exits to the tune of a quarter million per year.

These shifting demographics have caused visible changes in market values, media companies, consumption, and technology platforms in ways that are readily observable. All of this affects the way marketing works today.

## How Marketing Has Changed

### In a world full of noise, loud isn't enough.

Once upon a time, those who shouted the loudest won. Offering a good product or service using a simple, tactical marketing approach was sufficient. Once customers were on board, good service was enough to keep them. In today's world, however, **nothing beats clarity**. Consumers are bombarded with more messages in more places than ever before, and their attention spans are shrinking by the nanosecond.

If you're not absolutely clear about the value your brand offers and consistent in the way you present it, you'll sink into a swamp of invisible, unheard messages. You'll become just part of the noise that surrounds us all.

That's why we tell our clients that **the most important task in building a brand and engaging the right customers is to move from noise to clarity.**

Customer experience has become part of your introduction to prospects. Customer experience is no longer just about retention and satisfaction, it also affects the very introduction of your brand to a prospect.

Today's consumers are educated and skeptical. They're highly likely to do some research before they hand over their money to a new business. They'll dig deep, read reviews, and check out your website and overall reputation. They're forming an opinion based on what other people are saying. To engage new

prospects, you must deliver an exceptional experience to your current customers. **If your message doesn't match the experience, your problem isn't just about losing current customers. Many prospects will never engage to begin with!**

That brings us back to our three-part strategy. Your brand's success depends on the unity and consistency of:

- A properly positioned **brand**,
- An effective **marketing** campaign, and
- And an excellent customer **experience**.

Once you fully embrace this unified approach, you'll generate loyal customers, reduce your marketing costs, and improve the productivity of that marketing. In short, you'll finally be able to grow your business.



FIGURE 3.1



## **STEP 1: Change Your Perspective**

Remember Peter and his luxury pools? After he embraced the idea of repositioning the Woodfield Landscaping brand, he and his team joined us for what we call a discovery meeting.

Matt kicked off the meeting with an exercise. "OK, Peter," he announced, "your business is now a bus. You're the driver. You see everything from the driver's seat, including your dashboard and the road ahead. You're greeting the passengers as they board."

"Got it," Peter quickly responded.

"Now change your perspective," Matt instructed. "Pull over at the next stop and get out of the bus. Walk

around and see how it looks from the passengers' point of view. Most importantly, talk with the passengers who are getting off. Find out how they felt about their ride. Did they like it? How could it be improved?

"Then go talk with the people waiting to get on. See where they're going, and what they expect of the ride ahead."

"I see where you're going," Peter nodded. "You want us to look at our business from the customer's perspective."

"Exactly!" said Matt. "Now for the next step."

## **STEP 2: Define Your Ideal Customer**

Matt grabbed a couple of life-size silhouettes leaning against the conference room wall. "Meet Woodfield's ideal customers!" he said. "These are the folks who would enjoy great value from owning one of your high-end pools. You wish you had a hundred customers like these. What would you call them? In fact, why don't you name them after your best customers?"

"That's easy," Peter replied. "Sally and George. I'd love to have more customers like them!"

"Why is that?" asked Matt.

"They're just great people," Peter said. "They're easy to work with. They trust us as experts, and they want only

the best. And they pay on time! They make it all seem so easy, even the sales process.”

“All right,” Matt asked, “so how would your business change right now if all of your customers were like Sally and George?”

Peter smiled. “That would be incredible!”

“Well, that’s exactly what we’re after,” said Matt. “Are you in?”

“Absolutely!” Peter said. “So how do we do it?”

Matt handed out stacks of colored sticky notes to each member of Peter’s team. “First,” he said as he walked around the room, “we’re going to learn as much as we

can about Sally and George. I'd like you to think about them and write descriptions of them. Keep it short: a single word or a very short phrase.

Then, let's dig deep and figure out everything we know about who they are, where they hang out, how much they make, their ages, that sort of thing. We're looking at both demographics and psychographics.

"We also need to look at their motivations," Matt continued. "Why do people like Sally and George want a high-end pool? Are they trying to just keep up with the neighbors or outdo them? Do they enjoy entertaining friends, family or business clients? Or is it just a way of saying, 'I've arrived, and this is what my hard work has earned for me?'"

“Once we put all that together,” Matt said, “then you can start building the Woodfield brand for all the Georges and Sallies out there.”

“Wait a minute,” Peter interjected, holding up his hand. “What do you mean build my brand for George and Sally? I thought my brand was about me!”

“That’s a common misconception,” Matt replied, “but think about it. **If you want to sell to your ideal customer, you have to build your brand for your ideal customer.** Your sales pitch, your marketing materials, your customer service—they all have to reflect what your ideal customers expect. That’s how you’ll attract them.”

### Worksheet 2.1: Ideal Customer Profile

To dig deeper, download a fillable PDF with our “Ideal Customer Profile” exercise. To access our worksheets, visit [beforeyoumarket.com/tools](http://beforeyoumarket.com/tools)

## **STEP 3: Segment Your Market**

### **What is a Market Segment?**

Generally, market segments exist when multiple groups or audiences see and value the brand differently. Market segmentation can be identified through demographic variations, business categories, and desired product or service experience differences.

“All right,” Matt said, “one last thing about Woodfield’s ideal customer. Besides building pools and outdoor landscapes, you service existing pools, too, right?”

“That’s right,” Peter responded. “Opening, cleaning, chemical treatment, closing—we do it all. And, I might add, very well.” There was a distinct note of pride in Peter’s voice.

"OK," Matt replied. "So, **these** ideal customers are looking for excellent service."

"Of course," said Peter.

"But they're not George and Sally," said Matt.

Peter paused. "I'm not sure I follow you."

"Well, these customers expect outstanding service," Matt explained, "but they already have pools. So, they're not looking for you to build them an amazing, high-end pool. This is a different segment of your market. The marketing here still needs to align with your brand identity, but it will be a different message that reaches your ideal **service** customer."



“In your case,” Matt continued, “your pool service employees also represent the Woodfield brand. Make sure their service trucks look clean and sharp. You’ll also need a uniform of sorts: maybe a nice polo shirt in your brand colors, so everyone looks professional.

“Set up rules for them, too. Everyone arrives on time. They’re courteous and respect the pool owner’s property. If they have to enter the home, they switch out their work boots for paper booties.

“Remember, your service customers are looking for expertise, not flashy pool designs. They want to feel like they can trust your employees to know what they’re doing and to make helpful suggestions that will save them time and money.

## **Worksheet 2.2: Your Marketing Segments**

To dig deeper, download a fillable PDF with our “Your Marketing Segments” exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

“In other words, your polite, professional-looking, knowledgeable service staff become a living embodiment of your brand.”

“Got it,” Peter nodded, taking notes as he spoke.

## **STEP 4: Identify Your Positioning Keywords**

“A key part of segmentation,” Matt continued, “is staking out your position in the marketplace. We’re going to do another exercise to help you figure that out. “This one’s very free-flowing. I want everyone on the Woodfield team to shout out a word that describes what your company is about. First thing that comes to mind; one word, from the perspective of your ideal customer, that would describe what your brand delivers.”

The team pitched in enthusiastically, calling out words like “fun,” “luxury,” “water,” and “professional.” After a lively discussion, the team selected the three words they felt best described Woodfield.

*PROFESSIONAL, EXCEPTIONAL, COMPLETE*

“All right,” said Matt, “these are going to be your positioning keywords.”

“You mean for search engines?” Peter wondered. “Do we have to use these words in everything we do from now on?”

“Positioning and search engines are not the same thing,” Matt explained. These keywords are the foundation of

your brand. They help position the brand. Actually, you don't have to use them in your advertising at all.

"These are the words—and attitudes—that set you apart from the competition. They describe how you want to appear, to your prospects, most importantly to the ideal customer your brand is reaching, and even to own your employees. Try to think out of the box! If your business was a color, what would it be? If your business was a book or a movie, what comes to mind?

"Blue Lagoon!" Peter yelled, and the team chuckled.

**As the team completed this exercise, two important changes became obvious. One,** the name "Woodfield

### **Worksheet 2.3: Your Positioning Keywords**

To dig deeper, download a fillable PDF with our "Your Positioning Keywords" exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

Landscaping” didn’t convey the full range of services the company offered. The first change was to rebrand it as “Woodfield **Outdoor Living.**” And **two**, we added one critical word that identified and differentiated their services from the competition. The new tag line, locked up with the new logo, became “Woodfield. **Exceptional** Outdoor Living.” Adding “exceptional” set Woodfield apart. Ordinary simply was not an option. Woodfield customers seek only the best. They’re willing to pay for it, and Woodfield can provide it.

## **STEP 5: The Birth of a Brand Promise**

“All right,” Matt stated, **“exceptional outdoor living”** is now your market position, and it’s the essence of your brand promise. Everything you do has to be measured by it: your hiring practices, your employees’ performance, your sales and customer experiences, and the quality of your work.

“Test any idea, any product or service you provide against exceptional outdoor living. If it helps you live up to your promise, keep it. If it doesn’t, fix it or get rid of it.”

After some discussion, the full expression of the brand promise emerged: **“We excite every customer with exceptional outdoor living experiences.”**

To better understand what that promise entailed, the teams discussed other famous brand promises. In many cases, those promises were stated directly in their tag lines, such as:

- BMW: The ultimate driving machine.
- Walmart: Save money. Live better.
- Arby's: We have the meats.
- GEICO: 15 minutes could save 15% or more on car insurance.

### **Worksheet 2.4: Your Brand Promise**

To dig deeper, download a fillable PDF with our “Your Brand Promise” exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

Each statement is a powerful promise of something customers really want. Each one sets an expectation of saving money, an elite driving experience, or savory, satisfying meat. Everything those companies do is built to deliver on that promise—and the same would be true for Woodfield, with its promise of delivering Exceptional Outdoor Living. Following these five steps takes you from noise to clarity.

**Great brands play beautiful music created for the ears of their ideal audiences.** Our brain recognizes information we don't need as noise and tunes it out. But when you give your message the structure and clarity that meets the needs and desires of your ideal customer, the brain will engage, follow along, and remember.



Once you have taken the time to:

1. Explore the perspective of your clients/customers,
2. Define your ideal customer,
3. Identify your market segments,
4. Choose your positioning keywords, and
5. Create your brand promise.

You will have built a firm foundation for your brand.

**You're finding the clarity that helps you break through the noise that surrounds us all and engage with the right people.**

But a foundation is just the beginning.



**BRAND**

shapes the

**PERCEPTION**

of  
your **business.**

CHAPTER 3

## Three Pillars of a Strong Brand

Now that you've built the foundation of your brand, it's time to pay attention to the key pillars that will strengthen and maintain its overall structure.

**Your brand foundation is built by positioning your brand and crafting a brand promise to bring value to your ideal prospects in various market segments.**

1. Ideal customer
2. Market segment definition
3. Positioning keywords
4. Brand promise

Built into the structure of the brand are all of the marketing tools and tactics we mentioned earlier. Think of them as the walls that define the scope of the brand and as the windows and doors through which people can clearly understand what your brand is:

- Your website
- SEO or search engine optimization
- Social media channels
- Email marketing
- Television ads
- Radio ads
- Billboards
- Print advertising
- Direct mail

And that's not even the complete list! What about:

- Uniforms,
- The designs on your fleet of vehicles,
- Stationery,
- Email signatures,
- The topics you blog about and the way they are written,
- And every customer experience touchpoint?

The list of tactics and tools that make up your brand is extensive.

As a result, you need something to hold together your brand foundation and your tactics and tools. We need some foundational, structural pillars that can hold all of this weight! You need:

- A **story** about your ideal customer
- that is **memorable**
- and **consistent**.



FIGURE 4.1

## **Pillar #1: A Story About Your Ideal Customer**

There's a huge reason why our journey to creating your brand foundation began with a shift of perspective to the customer/client viewpoint, and it's this: **Customers don't care about your story. They care about theirs.**

Unfortunately, if your brand story is about you, you're doing it wrong. In his insightful book *Building a StoryBrand*, business leader Donald Miller puts it this way: "The customer is your hero, not your brand."

Leading with our own story is instinctive. We feel the need to prove the worth of our product or service. But when we talk about ourselves first, people tune out.



Don't believe us? Try these examples and see which grabs your attention the most.

**Option 1**

*Brand3 'Has Been Helping Small Businesses Grow for  
More than 20 Years!*

vs.

**Option 2**

*You Deserve a Marketing Strategy That's Proven to  
Work. Find the Right Way to Market!*

**Option 1**

*Brand3's Team Covers a Full Spectrum of Branding  
and Marketing Services*

vs.

**Option 2**

*Your Brand Should Reflect the Greatness of Your  
Products and Services*

You picked number 2 both times, right? You picked it because it's about you. More specifically, you picked it because it identified your problem and promised to help you overcome it:

"My marketing isn't working." Well, we can show you there's a proven path.

"My brand presence is dated and sends the wrong message." Well, we're going to tell everyone how great your business really is!

You spent all of that time identifying your ideal customer so that you can speak directly to them and tell their story. In the process, they become the hero who overcomes a problem and finds the success

they're looking for! In short, **Every marketing tool and tactic that represents your brand needs to tell the customer's story.**

**But if the customer is the hero, who are you!? You're the guide!** In Miller's StoryBrand Framework, you're the trusted guide who helps the hero win the day—like the client who finally getting marketing that works and grows the business, thanks to the guidance of the trusty marketing agency. Put another way, you're no longer Luke Skywalker. You're Obi-Wan Kenobi. You're no longer Frodo Baggins. You're Gandalf the Wizard!

And right out of the gate, do you see how much stronger that positioning is? You're not trying to prove yourself as a hero. You're speaking from a place of

authority and experience and from a position that is naturally helpful and giving. It's a posture that nurtures trust, rather than fighting to earn it.

The 7-Part StoryBrand Framework goes like this:

1. A **hero**
2. Has a **problem**
3. And meets a **guide**
4. Who gives them a **plan**
5. And calls them to **action**
6. That helps them avoid **failure**
7. And end in **success**

There's a lot of conversation out there around narrative marketing, but we've found this structure

to be the clearest and most successful. We follow this method when building a brand story for your business. To better understand it, we recommend reading Miller's book, *Building a StoryBrand*, or utilizing Miller's great resources at [www.BusinessMadeSimpleUniversity.com](http://www.BusinessMadeSimpleUniversity.com). If you decide to use this framework on your own, having the proper guidance from a StoryBrand resource is critical.

But never fear, you will still be able to share your experience, qualifications, case studies, and testimonials. You'll share them after you have placed the potential client or customer in their own story and are ready to introduce yourself as the guide. For example, a website should lead by speaking right to your ideal customer's wants and desires. Then once the website has demonstrated that you understand the problems they're facing, you can explain why you're qualified to serve as a guide on their road to a solution.

# THREE PILLARS OF A STRONG BRAND

The screenshot shows the homepage of the SOS Smart Operation Strategies website. At the top left is the SOS logo with the tagline "Smart Operation Strategies". The top navigation bar includes links for "ABOUT", "SOLUTIONS", "RESULTS", and "RESOURCES", along with a phone number "(443) 280-1714" and a "Schedule an Assessment" button. The main heading is "Manufacture a Brighter Future" with the subtitle "Smart Operation Strategies for Manufacturing Companies". A central "Schedule an Assessment" button is prominent. Below this, three pillars are listed: "Strategic Planning", "Best Practices", and "Right People". A section titled "You can't change the world when you are constantly putting out fires" features a "Venn Diagram" placeholder and a list of common operational challenges: "Stalled or declining revenue", "Project and supply chain management challenges", "Lack of communication within the company", and "A need for transformation". A statement reads, "We help manufacturing businesses do global good by giving them a plan to develop and maintain operational excellence." Below this is another "Schedule An Assessment" button. The "Our Solutions Include" section lists three categories: "Project Based Solutions" (from top-line growth to bottom-line performance), "Interim Management" (cultural transformations, strategic initiatives, and leadership transitions), and "Coaching" (helping teams set SMART goals). A "Learn More" button is provided. The bottom section introduces "Dwight Delgado, your Master Operations Troubleshooter" with a placeholder for an "Introduction Video" and a note that "Dwight responds to customers who are hungry for transformation."

FIGURE 4.2

When it's time to talk about yourself as a guide, here are a few things to keep in mind.

### **1. A guide expresses empathy.**

Miller says that when we empathize with our customer's problems, we create a bond of trust that creates engagement. That's why it's critical that you show that you understand your client's pains and frustrations. Scan your marketing materials and make sure you've told your customers you care. They need to be reassured that you understand their problem and want to help them find a solution.

Don't overthink the empathy piece. You simply need to offer simple statements that align with the problems they're facing and say, in essence, "We get it. We understand."

What we might think is an obvious or “on the nose” statement is often exactly what people need to hear. If we were following the marketing examples above, it could be as simple as:

- We know you need your marketing to work, and
- We understand how frustrating it is when your brand isn’t living up to the quality of work you do.

### **2. A guide demonstrates authority.**

The StoryBrand Framework also confirms that your customers are looking for more than a “friend” to help them with their problem. When it comes to establishing trust, they want someone who has the credentials and experience to guide them to a solution. They need to see that we’ve “been there, done that.”

There’s a balance to be found here. You can’t brag about yourself so much that you start to become the hero of the story instead of the customer. However, the



use of testimonials, awards, case studies with statistics and results, or a listing of current customer logos are all perfectly suitable ways for us to demonstrate your authority to help your clients.

You simply need to say “Here’s why we know what we’re doing. Now, let’s get to work solving your problem!”

## **Pillar #2: Make It Memorable**

Let’s go back to John Hegarty’s quote for a moment: “A brand is the most valuable piece of real estate in the world: a corner of someone’s mind.” In today’s ad-weary world, that real estate is priceless.

### **Worksheet 3.1: Story Evaluation**

To dig deeper, download a fillable PDF with our “Story Evaluation” exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

The average consumer is subjected to a continual barrage of advertising messages from social media, radio, TV, billboards and direct mail, not to mention pop-ups and internet influencers. It's estimated that we are bombarded by over a thousand advertising images and sound bites every single day. As a result of this firehose of information, recent studies have shown that the average human attention span has dropped to eight seconds.

Don't think that's so bad? A goldfish has an attention span of nine seconds.

Why can't a local business pose the power of a national brand image? There are many reasons, but generally speaking it is because they don't start with strategy, the principles outlined in this book.

**To push through the noise, you need to make your brand memorable. Ask yourself these questions:**

**Brand name:**

Do my customers consistently remember my business's name? Or is it inconsistent or known in some shortened or abbreviated form? Worse yet, is it we are known simply as "that place that sells tires down on Orchard Street?"

**Value proposition:**

Can your ideal customer describe your brand's value in a single word and, if so, what would that word be? (If the response starts with "I guess ..." or "Gee, I'm not sure," you have some work to do. If you don't know, they definitely don't.)

### **Brand image:**

Can your customers recall your logo or tagline? Would they recognize one of your branded vehicles on the highway with only have a split second to notice it? How likely is it that the next day they'd connect an ad or a billboard from your brand with that vehicle? (If they don't connect, that's a problem.)

Here are some best practices for creating memorable content:

- **Know your ideal customer.** Build that brand foundation first! You can't connect with the ideal customer until you define who they are.
- **Tell their story!** A narrative marketing structure like the StoryBrand Framework outlined above isn't just

about clarity. People remember stories better than they remember facts, and they remember their own stories better than any others!

- **Make your brand name short, memorable, and simple.** People abbreviate everything. Organizations with long names will be remembered for their acronyms.
- **Keep your logo simple.** Logos that work well use simple marks that can stand alone and short company names that are easy to read.
- **Make your tagline short and easy to recall.** The best taglines are meaningful and clearly define the category that the business belongs to.
- **Be sure your message delivers value.** Everything should answer these questions for your prospects:

### Worksheet 3.2: How Memorable Is Your Brand?

To dig deeper, download a fillable PDF with our “How Memorable Is Your Brand” exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

What do you do? How will it improve my life? How do I get it?

- **Repeat yourself!** You'd be surprised how many people miss this point. When brands don't seem to be working, we all feel the need to come up with clever new words and ideas. Branding is an exercise in memorization; to be consistent in messaging, you need to keep telling people the same thing.

### **Pillar #3: Be Consistent**

Branding and marketing are exercises in memorization. So, you need to keep repeating the same thing. It takes the average consumer at least eight repetitions of a brand message to absorb it.

Those touchpoints should cross different media like crazy: in your website, ads, social media, print ads, customer experience touchpoints, and more. Today more than ever, consistency in branding is the key to solidifying your presence in the market.

**Consistency isn't just about supporting memorization. It's also about creating trust.**

Suppose your marketing compels potential customers to take the next step, like visiting your website or landing page. Once they arrive, it's crucial that they see the same message and visuals that drove them to respond in the first place. That will reassure them that they've arrived in the right place.

A mismatch in branding between the critical links in your marketing funnel and sales process will raise a red flag for people. Sometimes it creates enough doubt about whether they're in the right place that they bail out and move on. Other times, it creates damaging questions in their mind about the competency of your team and, by extension, the quality of your work.

Consistency is particularly critical for your logo, that quick visual summary of your brand. Your prospects and customers need to recognize it in a fraction of a second. If there's any difference or irregularity in the way it's used, you lose the element of certainty, and quite possibly a potential customer.



In the end, the only way to be consistent is to have a plan. Here's where you begin.

### **1. Create, and follow, a BrandMap.**

A visual map (BrandMap), is one of the easiest ways to keep your brand consistent. A BrandMap is basically a collection of all of your organization's branded materials, side by side.

**To create your own BrandMap, gather all of your branded materials in one place.** This might include logos, brochures, business cards, letterhead, packaging, and advertising. You should also include screenshots of digital images, websites and social media headers, as well as photos of your larger items such as outdoor signage and displays.

Lay everything out on a conference table to quickly assess how your brand is presented. Take photos of all the materials together so you can review them again.

Then, ask yourself questions like these:

- How consistently does your visual brand reflect your organization's identity, message and values?
- Does your logo appear the same on all items? (Even though you may have both vertical and horizontal versions of it, they should still be easily recognized as the same image.)
- Are design elements, like the color palette and fonts, the same across the brand?
- Are your images telling the right story? Are they all of the same level of quality? Do they have a unifying

visual concept? (For example, are you using highly filtered, “retro” images in one place and crisp, high-contrast modern ones elsewhere?)

- **Take a step back to look at it all. Take in the big picture of everything gathered together.** Review the overall image and messaging and rate the following aspects from one (poor) to five (excellent):
  - Overall consistency of image and messaging
  - Quality of images and messaging
  - Clarity of messaging (especially, is your value clearly communicated to your audience?)

**Once you’ve looked at the overall picture, it’s time for another shift in perspective.**

Imagine you are evaluating your business from the outside and seeing all of this material for the first time. Challenge yourself with these questions:

- In this current BrandMap, who is the ideal customer?
- Does this material speak to different segments of our market?
- Based on what's here, what are this business's positioning keywords?
- If you had to guess, what is this business's brand promise?
- Who is the hero of the story being told here? Is there a guide?
- Is there empathy in the way this content speaks to the audience?

Allow time for this process. Take breaks, don't do it all at once. Once you've taken a deep dive, you'll have a great sense of what needs to be addressed. Don't panic and don't get discouraged! You're not alone. Every business needs periodic moments of reckoning like this along its journey.

Make sure you finish with great notes and a list of actionable steps, based on what you learn, and find a good way to archive your current brand map and accompanying notes. **When you've clarified and refined your brand, it's time to create a new one!**

Once your message and visuals are unified and reworked, gather them all together into a brand map that you can pass on to staff and designers. Seeing your brand guidelines applied to actual content is very helpful in understanding how to sync up with your existing materials.

**For inspiration, download the worksheet to have a look at how a certain brand has evolved after mapping their brands.**

### **Worksheet 3.3: Brand Map**

To dig deeper, download a fillable PDF with our "Brand Map" exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

**Finally, keep updating the map!** As new elements enter the mix, catalog them. Keep the full map readily available for staff and vendors. Keep these tips in mind:

1. Using a brand map to diagnose the consistency of your brand is critical.
2. Creating an updated resource is even more important and will help you maintain consistency moving forward.

Although your Brand Map will create general cohesion and inspire your team, you will still need super-clear, specific guidelines for messaging and design. We'll address those in the next chapter.

## 2. Get Your Staff Interested in Architecture

To build the three pillars of your brand, you need a memorable and consistent story about your ideal customer. But here's where too many small businesses fall short. **You can build the strongest pillars in the world with the best story, memorable traits, and a consistent presence, but if your team isn't on board, those pillars will topple and fall.**

The key to building a successful brand is turning your staff into architecture geeks. Give them the inside scoop on how the brand was designed. Help staff recognize the support pillars that others would look right past.

### **Your staff needs to:**

1. **Know the story of your ideal customer.**
2. **Make the message memorable.**
3. **And guard the consistency of the message.**

Start by imparting this information to your team and incorporating it into your training and onboarding procedures.

### **Worksheet 2.3: Your Positioning Keywords**

To dig deeper, download a fillable PDF with our “Your Positioning Keywords” exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)



### 3. Hold people accountable for protecting your brand.

Here are some ideas:

- Confirm that all new marketing content aligns with your brand story, is memorable, and is consistent with the BrandMap.
- Make the process fun. In *Building a StoryBrand*, Donald Miller recounts how he kept a wad of five-dollar bills in his pockets so he could reward team members for correct answers about the core messaging of the business. What else can you think of?

#### Worksheet 3.4: Onboarding Your Staff

To dig deeper, download a fillable PDF with our “Onboarding Your Staff” exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

This can sound like a lot, but don't get overwhelmed! There is heavy lifting involved in establishing a clear brand that breaks through the noise. Once that initial work is done and your team is on board, maintaining it gets easier and the results of doing so will motivate people to protect it.



**BRAND**  
**CONSISTENCY**  
**BUILDS**  
**TRUST**

## CHAPTER 4

# Protect Your Brand

In this chapter, we'll go over the tools you need to craft your brand guidelines and explain how to set your team up for successfully protecting your brand. We'll also cover when legal protection may be helpful for building your brand. Lastly, we'll look at crucial information for launching a successful first campaign.

## Create Your Brand Guidelines

**One of the best tools to protect your brand is a brand guidelines document.** Most major brands have graphic standards that help them maintain consistency. A

brand guidelines document provides explicit guidelines on the use of graphic elements, such as logos, colors, and fonts.

The brand guidelines also detail how your brand **message** should be conveyed. Many businesses focus only on the visual, leaving the rest of their brand presence unprotected! Be sure to detail the memorable story you've developed about your ideal customer so it remains consistent.

### **Brand consistency builds trust**

Large companies like Coca-Cola have massive brand guidelines manuals; a small business won't need anything that elaborate. Your brand guidelines document is simply a list of do's and don'ts that make it clear how your brand image is to be conveyed.

An effective brand guidelines document should:

- Be simple, yet specific, making your guidelines easy to follow, even for someone who isn't a designer.
- Contain clear logo and tagline usage guidelines that include both "Do" examples of best practices and "Do Not" examples of common misuse.
- Include rules for the use of visual elements, such as colors, fonts, photography, and illustrations.
- Go beyond the visual elements to address your brand's story, personality, and voice.
- List all written standards. These could include detailed rules for the use of your company name when it is written out, any grammatical issues you're concerned about, or when and how to use trademarks or service marks. Some organizations may need to list words or phrases that should not be used, particularly if they're forbidden by government or trade regulations.

**The goal is to create a guide specific enough that anyone, inside or outside of your company, can consult it to understand the rules and apply them correctly.**

Let's look at a few examples of what these documents usually include:

**Color:**

Color is the first element the eye sees. It evokes an instant emotional response and **increases brand recognition by 80 percent.** *(Source: Loyola University of Maryland study)*

Your guide needs to include more than examples of colors. It needs technical detail (color codes and values) to guide graphic designers in the consistent use of

those colors in both digital and print assets. Without that consistency, your customers will notice even subtle differences and read them as mistakes.

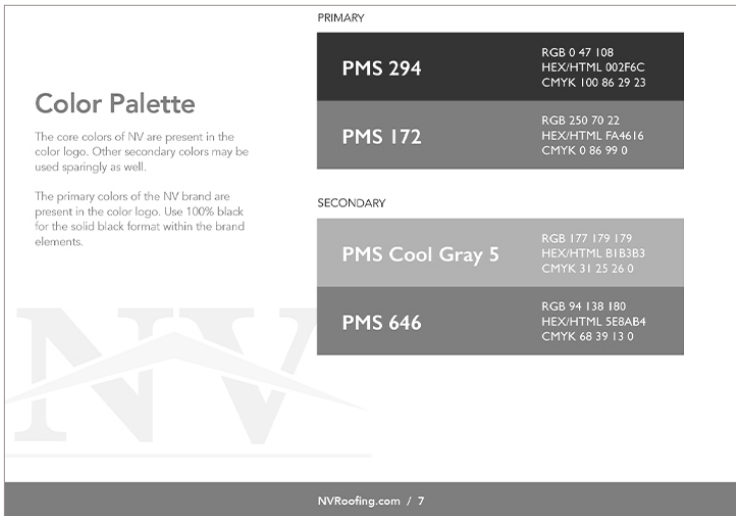


FIGURE 5.1



## **Fonts:**

Define the precise fonts to be used by your brand across all media. There's a huge difference between the personality of a brand expressed by:

- **A traditional font like this ( Times New Roman )**
- **Or a clean, modern font like this ( Montserrat )**

If your brand uses different fonts across its website, emails, blogs, brochures, and other elements, it will lose cohesion.

**Here are things the brand guideline should detail.**

- Which variations of the font are acceptable? Fonts come in many different weights, from light to extra bold, and the effect of weight on the font can change the appearance of the font greatly.
- How are characters to be spaced? If they are crowded together or spread too far apart, it will feel like a different brand.

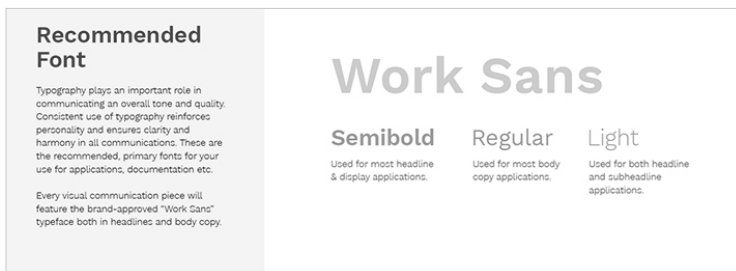


FIGURE 5.2

## **Logo and Tagline:**

Your company's logo is its visual calling card. Once you've established it, it is the visual summary of your brand, the story it represents, and the promise you make to your customers.

### **Your logo should be consistent across all media.**

Other than any variations you deliberately create, it shouldn't be altered in any way. It shouldn't be disproportionately stretched, re-colored, or paired with other words or objects that don't reflect your brand image.

**However, typically you will need a few key variations of your logo.**

- Many companies will configure their logos in two ways, such as a more squared presentation and a longer, horizontal one, for different applications.
- You will typically need versions in full color, white, and possibly grayscale version of the logo for different design applications.
- You might benefit from having versions of your logo with and without your tagline.

These variations should still be easily recognized as the same logo. That's where a skilled designer's work comes into play. Then, your guidelines must vigorously defend these visuals and make sure no other variations are used.

**And don't forget about your tagline!** It will usually be presented along with your logo, so you'll want to be specific about how it interacts with the logo. For example:

- How should the tagline be proportioned compared to the logo?
- What font does the tagline use, and is that font visually compatible with the logo?
- How is the tagline spaced in relationship to the logo?
- How is the tagline to be written? For instance, in the example below, the tagline below the logo is all in lowercase letters.

Here's how our friends at Turning Point Financial's guidelines protect the use of their logo:

## 2 LOGO MISUSE

---



The logo should never be used in any form other than the formats designated in the Brand Guidelines. To ensure your logo is properly displayed and your brand is consistent:

- Do not change any of the colors within the logo.
- Do not stretch the logo.
- Do not add a drop shadow to the logo.
- Do not place the logo on an angle.
- Do not substitute fonts.
- Do not change position or spacing of letters.
- Do not change position of tagline or symbol.



FIGURE 5.3

## **Photography and Illustrations:**

This one is both interesting and easy to overlook. You should provide guidelines on the use of photos and illustrations because:

- If your brand uses realistic images of people working in an office on your website and social media but its brochures are dominated by cartoon images, you may have a break in your brand.
- If your brand usually presents high-contrast, colorful photos and suddenly switches to filters that give your images a faded vintage look, you may no longer be telling the same story.
- Black and white is a very specific choice. If grayscale images appear in your marketing materials, what's their purpose and what story are they telling about your brand?

- Is your brand high-fashion? Are your sales hinging on demonstrating expertise? You need high-quality professional photos.
- Using stock photos risks repeating someone else's marketing, perhaps a competitor's. On the other hand, does your brand need custom imagery to project its elite standing in the market?
- Will your illustrations have a hand drawn look or appear very sleek, clean, and modern?

Make sure these guidelines are consistent with the rest of the brand. **Do the choices you've made align with the needs and desires of your ideal customer, your brand promise, your messaging, and the other visual elements of your brand?**



Give people solid examples of what to do and what not to do with sample images and illustrations. Give them bullet points to explain why certain images and illustrations work with your brand and others don't.



FIGURE 5.4

**Story:**

List your brand promise, including the brand messaging you've already established. Again, we recommend using the StoryBrand framework. Here's an example of the story that defined the brand for our clients at Peake Technology.

Peake Technology's ideal customer is a healthcare administrator who needs reliable IT infrastructure. Having a story like Peake's, which is shown below, will assist in guiding content creation for your entire brand from websites to emails, blogs, ads, case studies, and more.

## **Narrative Example:**

*At Peake Technology Partners, we know you want to provide reliable Healthcare IT for your team. To do that, you need your IT to work so well that you don't need to worry about it.*

*The problem is, Healthcare IT is too complex to manage in-house, and it's hard to find a partner you can trust. Too many IT providers are unreliable and inefficient, which makes you feel incapable of providing a solution for your team that works. We believe you deserve to focus on healthcare while your IT runs reliably in the background.*

*We understand that in Healthcare IT, the most important thing is trust which is why we've built an army of experts to support you.*

*We provide you with a 99.99% Uptime Guarantee, and we've built our own datacenter to make sure it happens. To guarantee your security, we also built our own high-speed internet network. Through these efforts and more, we've achieved a 97% Customer Retention Rate.*

*Here's how we do it.*

- 1. Schedule a Conversation. We'll make sure we understand the unique needs of your medical business, and we'll build a custom solution that supports them.*
- 2. Make a Smooth Transition. The most intimidating part of any change in IT partners is the handoff. We'll make sure it runs smoothly with minimal disruption for your team.*

*3. Have a Partner You Can Trust. Trust is earned, and we'll be working 24/7 to make sure you have secure Healthcare IT that runs reliably in the background of your busy day.*

*So, Schedule a Conversation with us. In the meantime, download our free PDF resource, *The True Cost of Downtime: A 7-Part Strategy for Protecting Your Practice*.*

*You can stop feeling like your IT is unstable and instead be supported by a trustworthy partner and an infrastructure that runs seamlessly in the background while your patients get the quality care they deserve.*

---

Now that you've read it, see how this narrative plays out in the copy and design of their website homepage at <https://peaketechnology.com/>.

## **Train Your Team to Protect Your Brand**

**Everyone in your organization should have access to your company's brand assets and brand guidelines document. All employees should have a copy of and follow your brand guidelines document.**

Then think about the things that go **beyond** visuals and messaging in your marketing collateral. Think forward to the customer experience and how your employees themselves represent the brand. Your employees should:

- Deliver outstanding customer service from everyone in every job, every time;
- Wear neat, clean brand apparel, especially service crews and sales personnel; and
- Follow a strict social media policy: only business on company accounts; no personal opinions

## Consider Legal Protection

You may also want to speak with an attorney about copyrighting, trademarking or service-marking your company name, products and/or services, logo and tag line. It's not mandatory, but it could protect you in case someone (accidentally or otherwise) comes up with something that looks or sounds like your brand.

### Worksheet 4.1: Onboarding Your Staff: Part 2

To dig deeper, download a fillable PDF with our "Onboarding Your Staff: Part 2" exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

## Put Yourself Out There

You've worked hard to create a clear message and image. Everyone in your company is on board with the plan. Now you're ready to present your brand the way a much bigger brand would.

**You're about to do what major international brands do: project a consistent, high-quality image that's:**

- clear
- targeted
- and translates into trust.

To make the most of this hard work and to secure that trust, you must examine your customer experience. We'll address that in the next chapter.



## Launch Your First Campaign

Now that your brand is established, it can now guide your marketing campaigns. **Everything you do in marketing needs to speak to your ideal customer and align with your:**

1. Brand Promise
2. Brand Map
3. Brand Message
4. Brand Guidelines

Your overall brand will lead the way. You'll want to establish specific brand messaging for each segment using the StoryBrand framework.

**Finally, don't forget to consider your customer experience.** If your marketing makes claims about

quality or service, be sure the process is in place to back them up!

We could easily write another book on how to apply your brand to your marketing campaigns and how to manage such campaigns effectively. (Maybe we will!) But for the moment, here are a few overall thoughts to consider as you develop your strategy.

- **The first question our clients ask is always: “How much is this going to cost me?”** In most industries, a healthy marketing budget can run anywhere from three percent to twelve percent of annual sales. That may seem like a lot, but remember: customers will always come and go. Your goal is to keep more customers coming in than are leaving and to work like mad to hold onto them.

- **Successful campaigns are built on frequency.** Find out where your ideal customers are and what media they prefer, then hit them multiple times with your consistent message. Digital and social media are popular, but not the only, choices. (In fact, digital and social media can be cluttered and noisy at times.)
- **Don't write off "old school" marketing tactics.** Email campaign are still very effective. Billboards and print media work in the right context. Direct mail still works, and can be very precisely targeted. If television is too rich for your budget, consider radio. Production and media costs are lower and, like direct mail, radio can be carefully targeted to your ideal customer.
- **Don't sacrifice quality for quantity.** If you can't afford to appear in a particular medium as frequently as you'd like, don't. Push that money into other media.
- **Carefully track what works.** Once you understand the return you are earning on marketing (your marketing ROI), you can double down on the tactics that connect with that ideal customer.
- **Always keep your brand and creative standards high and consistent.** People will judge your brand

by the quality of your visuals and graphic design. Clarity of your marketing copy is just as important to maintain. If people get confused, they lose trust in your product and in your ability to solve their problems.

- **Every communication should point to the next step or interaction.** This is what we call a CTA (Call To Action). It may be as subtle as offering a white paper or free advice in a blog. Don't hesitate to be obvious about it! You've spent all this time building a powerful brand message. Make sure you finish bring it home by telling your customers exactly what you want them to do next. Make the URL or phone number prominent. Make it easy for them to take the next step.

Now that you know how to build and protect brand guidelines and are prepared to launch your first marketing campaign, it's time to focus on customer experience. This next chapter will delve into tools your business can use to create and maintain extraordinary customer experiences.

**Experience is  
where your  
brand becomes**

**REAL**

CHAPTER 5

## Deliver an Exceptional Customer Experience

Not so long ago, it was enough for a company to utilize a reactive customer service model to address issues as they emerged. Today, this strategy is no longer effective. **By the time a bad experience reaches a reactive customer service platform, your brand could be completely damaged by social media and word of mouth.**

We must be proactive and design end-to-end experiences for customers that deliver on your brand promise at each and every touch point.

**That's why Customer Experience (CX) Design is the third key to a successful marketing strategy. It's really this simple:**

1. Your brand is the **story** you're telling.
2. Marketing is **how** you tell it.
3. And your Customer Experience is **where it becomes real.**

CX Design is how you live up to your brand promise. You want to be sure your story belongs on the non-fiction shelf!

Great marketing creates trust. Customer experience deepens and maintains it.



FIGURE 6.1



## Design Your Customer Experience.

**The experience age is here.** Those who practice or follow the changes in market and media will validate this truth: the age of advertising has changed.

Customer Experience Design requires us to build innovative cultures and to ensure what we say” and “what we do” are the same thing. Of course, Customer Experience is always exceptional when we **deliver an unexpected pleasure.**

- The teams who are doing it right go beyond “what I want.”
- They design a culture that delivers an experience that surprises and delights their customers.
- And their customers come back for more.

What is customer experience design? **Your brand is how people perceive your business. Understanding and managing that perception is at the forefront of CX Design.** A high-end product and well-trained employees won't matter if the customer has a bad experience. That's how they will perceive your brand. And if that doesn't humble you, nothing will.

You can put all the money in the world into a product or service and support it with the finest talent in the industry, but the judgment that matters most about your brand begins and ends with your customer's experience. **Try thinking of Customer Experience Design as the map of how you will manage customer interactions across every step of the customer journey.**

1. The customer journey map lists all of the various customer touchpoints (we'll talk about that more later on in this chapter).
2. Every touchpoint should be designed to provide a Customer Experience that aligns with your brand's promise.

In short, Customer Experience Design is how companies track and measure how they engage with customers and build long-term, loyal relationships. Discovering what your customers are really saying and feeling about your brand is essential. CX Design should include customer feedback at each touchpoint.

## **Use Your Net Promoter Score to Gather Customer Feedback**

The Net Promoter Score is an invaluable tool for measuring your success with CX Design and identifying where you need to improve. What is the Net Promoter Score? It's built around one, simple question:

*On a scale from 0 to 10, how likely are you to recommend this product/company to a friend or colleague?*

The NPS was first introduced by Fred Reichheld in 2003 and has been used by major corporations and small businesses ever since. It sounds simple, but this one question cuts right to the heart of the relationship

between your business and its customers or clients. The sum total of the customer's experience lies in their willingness to recommend you. As a result, the NPS becomes a predictor of business growth based on customer satisfaction. **Most importantly for your brand, the NPS helps you understand the perception people have of your business!**

Responses to this question are divided into three categories, assuming ten is the highest possible answer.

- **Promoters** (9 or 10): People who give you a nine or ten are most likely to become advocates for your brand. They will support your business by word-of-mouth and on social media, and they'll provide referrals that drive revenue and growth.

- **Detractors** (0–6): These people are highly unlikely to promote your business, much less become repeat customers. Worse yet, they're likely to speak poorly of your business and damage its reputation.
- **Passives** (7–8): These seem like high scores, but these people are still unlikely to actively promote your business. At the same time, they're unlikely to speak poorly of it. Strategically, it's important to recognize that this group could easily be won over and converted into Promoters!

Here's how you calculate your NPS score:

**Your NPS = the percentage of Promoters minus the percentage of Detractors in your survey.**

Your NPS score could (theoretically) range from -100 to +100. (If you ever see someone score 100 either way,

let us know!) Any negative result is cause for alarm, because it means your Detractors outnumber your Promoters! To understand how your score compares, it's best to research average NPS scores for your industry for a fair comparison.

Here's how you get the most value from an NPS survey. The NPS question forms your benchmark metric, but you need even more information! **Follow-up questions, like the ones below, let you begin to understand and diagnose the responses.** There are many ways to formulate these queries, but here are the main categories you'll want to cover:

- Why would you recommend us (or not)?
- What went well?
- How can we improve?

- What can we do (or could have done) to WOW you?

Variations of these questions may serve your business better, and you might drill down to more specific areas of your customer experience. Just keep in mind that a short survey will garner the most responses.

**Here are some other ways to get more value from your survey:**

- **Remember your market segments!** At the very least, you'll want to responses from customers in each market segment.
- **Remember your brand promise!** You need a baseline for formulating your follow-up actions. View the results through the lens of your brand promise and align your response accordingly. Where did you live up to it, and where did you go astray?



- **Don't forget to say thank you!** The survey should not be the end of your customer's journey. An appropriate thank you note is your opportunity to encourage Promoters, pursue the Passives, and disarm the Detractors by thanking them for their input.
- **Most importantly, establish a process for responding to feedback** and implementing change in your customer journey! Without a feedback loop, the whole exercise is in vain.

### Worksheet 5.1: Net Promoter Score

To dig deeper, download a fillable PDF with our "Onboarding Your Staff" exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

## Map Your Customer's Journey

**Create a map of your customer's journey, starting with their very first interaction with your company.**

Customer journey maps help you see your product or service through the customer's eyes. They provide key insights into the thoughts and feelings of your clients during their interactions with your firm.

**The goal of journey mapping is strong alignment between your brand promise and your customer's actual experience at critical touchpoints.** Knowing

when, where, and how your customers interact with your business will allow your team to craft strategic responses that will keep the experience on a consistently high level.

Remember, your business exists to make a difference in your customers' lives. Everything should be focused on how you're easing their pain, solving their problems, or proposing a better (or perhaps less expensive) way to do something they're already doing.

As with any analytical process, you can go as far down the rabbit hole as you want, or engage professionals to manage it for you. However, **the instructions below will give you a simple, practical approach that any business can use.** In the end, it's the commitment to do

this work and follow up on what you learn that makes the difference!

### **Step One: Outline every stage of the journey**

**Write your brand promise at the top of your outline and list every stage you can think of.** Then, ask your teammates what you forgot!

Let's take a fictional company as an example. We'll call it **Pizza Pro**. Pizza Pro sends people at-home pizza making kits each week, like what Hello Fresh does for dinners.

Their brand promise is **A Triumph Every Time**. Pizza Pro wants people who make their pizzas to feel

confident that they will succeed in providing a great experience for their loved ones. The instructions are easy and the recipes are creative and unique (although customers can still get the classics for their picky eaters). The dough is pre-made, and the ingredients are premium, pre-portioned, and never frozen.

**What are the stages? We'll figure it out by thinking through every touchpoint Pizza Pro has with the consumer.**

1. Marketing
2. Website navigation
3. Account creation
4. Checkout process

5. Order updates
6. Packaging
7. Instruction sheet
8. Delivery notifications
9. Making the pizza
10. Customer support
11. Customer feedback
12. Re-marketing

What touchpoints would you not have thought of as part of the customer journey before now? What did we miss?

## **Worksheet 5.2: Outline Your Customer Journey**

To dig deeper, download a fillable PDF with our “Outline Your Customer Journey” exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

## **Step Two: Examine each stage**

Emotion is a major part of every customer's experience with any brand. Creating a positive emotional experience should be your focus along every stage of a customer's journey. Looking closely at each stage will complete your journey map and empower your CX Design. This will be the structure that helps you be innovative and improve your products and services.

### **Answer these five questions for each stage of the customer journey on your list:**

1. How does the customer interact with your business during this stage?
2. What is your customer thinking at this stage?

3. What feedback have you received about this stage of the journey?
4. What experience can you provide customers that will address what your customer is thinking, while still aligning with your brand promise?
5. What needs to happen internally to create this experience?

Let's take a look at one of the stages from our **Pizza Pro** example to see how this plays out.



Product/Service: Pizza Pro Meal Kit Subscription  
Service

Brand Promise: A Triumph Every Time

Stage: #2: Website Navigation

**1. How does your customer interact with your business during this stage?**

Before creating an account and placing an order. The customer uses the website to figure out what we offer and how it works, and navigates the product menus to find pizza recipes they can get excited about.

**2. Write one word to describe what your customer is thinking at this stage.**

How?

The customer is wondering, "How does this work?" "Will it work for me?" "How do I choose the pizza kits?"

*(If your team gets stuck here, brainstorm and write down five to ten words, or even some phrases, but then pick the ONE word that feels most relevant. We landed on that one core word, HOW, by writing down those questions. In the end, you want the essence of what's going on here, and here the big thought is "How?")*

### **3. What feedback have you received about this stage of the journey?**

*(Here's where your NPS research and any other feedback you have comes into play.)*

We have several customer reviews that say "I was confused about how it worked at first, but the pizza looked so good and the kids on the website looked so happy, I gave it a shot. I felt much clearer about the process once I read the instructions in the box." We also have feedback from Detractors from the recent NPS survey. When asked for what we could improve, fully half of that group said it was hard to navigate pizza recipes and understand the full list of available ingredients.

**4. What experience will address what your customer is thinking, while still aligning with your brand promise?**

If we are promising “A Triumph Every Time,” we are promising that the process will be easy and clear. If we are unclear about how the subscription pizza plan works to begin with, it will be hard to earn customers’ trust. If it’s hard just to find a favorite pizza recipe, it will be hard for customers to be confident that making the pizza will be easy. We need to be sure we are building confidence in an eventual “triumph” at every touchpoint. This is especially important in answering the “How” questions clearly both in our copy and UX design of the site.

## **5. What steps need to happen internally to create this experience?**

Marketing is working on new copy and wireframing for the home page to better explain how the subscription plan works. We will test the copy and then deploy within two weeks. Marketing is also developing an animated explainer video to help narrate the Pizza Pro process to be deployed in four weeks. Marketing is collaborating with IT to re-map and improve the UX design of navigating the pizza options.

**Look how much those five simple questions accomplished at just this stage of the journey.** This takes time, but it is immensely do-able! For each stage,

### **Worksheet 5.3: Analyze Each Stage of Your Customers Journey**

To dig deeper, download a fillable PDF with our “Analyzing Each Stage of Your Customers Journey” exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

you will have identified the core of what your customer needs, listened to their feedback, aligned a solution with your brand promise, and set in motion an action plan to address it.

**Now it's your turn again! For each stage of your customer's journey, use the worksheet below.** Once you've gone through all of your stages, you will have a powerful customer journey map that will turn more of your customers into promoters and drive revenue for your business!

## Deliver Your Brand Promise

**In the end, a successful brand is about trust. People turn to certain brands because they know they'll deliver on their promises.** Tide will get their clothes clean. Coca-Cola will refresh them. Nike will help them reach whatever peak athletic performance they're looking to achieve.

When your brand looks trustworthy; when your customer service delivers on your brand promise; when you present a clear, compelling image time after time, then you'll create that trust, too.

Here's a great success story from our friends at Woodfield Outdoors. Recall that Woodfield Outdoors develops high-end, luxury backyard experiences.

It takes time (sometimes, a lot of time) to dig up a backyard and install beautiful pavers, pools, and landscaping, and it makes a big mess in the process.

Let's walk through the five customer journey questions with this real-life example. Here's their promise again: *Exceptional Outdoor Living*. We'll call this stage "Construction."



**1. How does your customer interact with your business during construction?**

“Woodfield’s clients are a “captive audience” to the construction process.”

**2. Write one word to describe what your customer is thinking at this stage.**



FIGURE 6.2

Most of Woodfield's clients haven't anticipated the carnage that is the construction process. They've been promised Exceptional Outdoor Living, but all they see is a big mess in the backyard for weeks or months.

**3. What feedback have you received about this stage of the journey?**

"Woodfield hears from many clients that they are embarrassed by the mess and stressed and worried about the final result."

**4. What experience will address what your customer is thinking while aligning with your brand promise?**

"Here's where it really gets fun! Woodfield's team thought about the beautiful, high-resolution CAD

renderings of the final product that they use in design consultations. Seeing these images creates the most powerful moment of confidence in clients' minds that Exceptional Outdoor Living is on the way."



FIGURE 6.3

### Worksheet 5.4: Creative Solutions for CX Design

To dig deeper, download a fillable PDF with our "Creative Solutions for CX Design" exercise. To access our worksheets, visit [beforeyoumarket.com/tools](https://beforeyoumarket.com/tools)

So, they came up with the idea to print these drawings out on all-weather signs and post them outside the windows that faced the mess. This way, there was always something beautiful for the client to see, and the image serves as a reminder of Woodfield's promise of exceptional outdoor living. "This will be exceptional – and worth it. Just hang in there!"

### **5. What steps need to happen internally to create this experience?**

"This was an easy win! The drawings already existed, so Woodfield just had to create a workflow for getting them printed and delivered to the site. The feedback from clients has been exceptional, and critical to Woodfield's success. They want clients to remember weeks' worth of happy thoughts during the process – not stress and doubt!"

## **Let the Customer Speak for You**

**This is the end goal of any good CX Design:  
turning customers into Promoters!**

Capturing and utilizing the voice, sentiment and insight of your clients (especially your most valuable ones) is critical to help you build trust with potential customers.

For example, if you tell a prospect “We have great customer service,” you sound like you’re bragging, and prospects wonder if it will prove to be an empty boast. But when a friend, business associate or family member says, “Oh yes, they have great customer service,” it carries much more credibility. They’re not paid by you. They have no reason to lie about you.

**An honest, unsolicited endorsement can be worth thousands of dollars of paid marketing.**

Some of that happens out of your control by word-of-mouth or on social media. However, there's one way you can make sure customers speak for you and control the content.

**Testimonials are one of your most powerful assets!**

Testimonials are also one of the oldest advertising techniques available, **because they work.** When someone has no reason to recommend you other than a good experience, it carries enormous weight. In the same way that a bad social media review can damage your brand, a credible testimonial can build it.

Use testimonial videos wherever possible on social media and your homepage. Keep them short and punchy. In print, try to sum everything up in three sentences:

- Your customer's **problem**,
- Your company's **solution**,
- The happy **outcome**.

For example:

*"Brand3 transformed my business. Their strategy allowed me to reduce my marketing cost and double the size of my business within 2 years."*

Peter Curro, Owner, Woodfield Outdoor Living.

Video testimonials can be a bit longer, of course, but use those sentences as the outline of a natural story flow, while keeping your video as short as possible.

**Testimonials offer one other huge advantage: they cost little or nothing to produce. So, they're an extremely effective way to stretch your marketing budget, especially for a small business.**



Here are a few helpful tips for deploying testimonials.

- **Use photos!** When you're requesting testimonials, ask people to include a photo that you can post next to the text. Seeing a real human greatly enhances the authority of a testimonial. It doesn't need to be a big photo, just a little thumbnail. (Knowing it won't be shown really big sometimes helps people. Say it will be the size of a social media profile picture or smaller.)
- **Give people options for how to be identified.** Some people are fine saying Mike Smith, Bethesda MD. But give them options and control of how they are identified, for example, as M. Smith or Mike S. or Client, etc.) Let them know up front that you respect both their privacy and their preferences.
- **Write it for them!** – You'd be surprised how many people are open to this. Offer to write a testimonial for their approval. This works well in B2B situations and clients with whom you have a good relationship. It allows you to give the testimonial a problem-solution-happy outcome structure.

- **Use the best excerpt on your home page.** If the testimonial is longer than a few sentences, it works well to drop its best excerpt of a testimonial on your home page and offer a link to “Read More.” That keeps from overwhelming your page with text.
- **Get creative!** Be creative with how, when, and where you use testimonials. Websites are obvious, as are flyers, etc. Where else can you embed these glowing endorsements of your business? This will always be some of your very best marketing material. Get it out there every way you can!

As we’ve demonstrated, designing a customer experience with a customer journey map that stays true to your brand promise allows your business to create exceptional customer experiences. You can evaluate your customers’ experiences using your NPS to gather feedback, and don’t hesitate to let your customers speak for you. Utilize those glowing testimonials, and let your customers become proud endorsers.

# BRAND

is the most **VALUABLE**  
piece of **REAL ESTATE**  
in the world: a **CORNER**  
of someone's mind.

## Conclusion

Too many businesses struggle with marketing.

So, **before you market, fix the brand.** That's our core message at Brand3. Our brand promise is to help business owners find "The Right Way to Market." Here's what that brand promise looks like in action.

1. **Align your brand** with your audience's wants and desires.
2. **Create a promise** that defines the direct value you bring to them.
3. **Consistently deliver on that promise** in every interaction you have with them, both in your marketing and in the customer experience.

When you align your marketing and customer experience with your branding, you'll **improve your ROI** on marketing and **grow an audience of Promoters** who will help you to grow your business.

You can do this. Branding is for all businesses. The process we've outlined will take some time, but the investment will come back to you many times over.



FIGURE 7.1

If you'd like professional guidance through this process, we're here to help. We believe it's just plain wrong that so many businesses aren't able to reach their full market potential because their brands don't reflect the greatness of their products and services. We have decades of experience, and **our clients report an average growth of 61 percent in annual revenue within two years of implementing our B3 Plan.**

Schedule a call at our website or feel free to reach out through the contact information below.

Here's to your success!

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443.945.2893

## CONCLUSION

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## About the Authors

### **Matt Christ**

Matt has managed and produced effective brand and marketing strategies for a wide range of corporate and nonprofit organizations in the Mid-Atlantic region. His success is driven by his simple and profound belief that the same quality standards that make national brands successful should be applied to every size business.

Matt serves his current client base through the utilization of a virtual network consisting of local and global creative and manufacturing resources, combined with 27 years of industry experience and a passion to help business owners improve their bottom line.

He has served on the Economic Development Commission for the City of Aberdeen and has

developed and taught on the subject matter of effective brand/marketing for the Small Business Development Center (SBDC) in the Northeastern region. He lives in Harford County and is enjoying 37 years of marriage with his wife Kim, and their 9 children and 17 (so far) grandchildren.

## **Orsolya Herbein**

Orsolya (short Orsi, but pronounced Orshie) didn't wait long before revealing her passion for art and creativity: At the tender age of three, she won an International Drawing Competition in Eastern Europe. Once the time came for Orsolya to pick a career path, graphic design seemed a natural fit. Orsolya attended the New England School of Art and Design in Boston and obtained a B.A. in Graphic Design.

After graduating, Orsolya began her professional design career primarily in the pharmaceutical industry, while continuing to serve various clients as a freelance designer. With the rapid rise of digital and web media, Orsolya saw it essential to broaden her skills and returned to school to study Interactive Media and Web Design. This allowed her to

become very versatile, multifaceted, and able to offer a wide range of services in the design industry.

Orsolya's creative approach is similar to problem-solving: How can a visual best represent the core meaning it needs to convey? Orsolya's clean style brings together both aesthetics and function with never an unnecessary element in sight. As an immigrant from Hungary, and having always been interested in different cultures and ways of living, Orsolya brings an open mind with an ability to step into the shoes of her clients. Her work always involves thorough research and asking questions that flaunt her lovely accent.

A mother of two, a devoted wife, and caregiver of quite a few pets, she lives in Northern Maryland. She enjoys nature, books, and pretty much anything thought-provoking that has the potential to deepen her values and better her character.

## About Brand3

At Brand3, we know you need to be confident in your marketing. To do that, you need to find an approach that works.

The problem is, most marketing becomes noise that fails to engage or drive results, which leaves you feeling frustrated. We believe your business deserves to reach its full potential in the market

We understand how frustrating it is to waste your time and money on noise, which is why we've used our decades of experience to help hundreds of businesses move from noise to clarity by defining their brands.

We use a unique process to align brand, marketing, and customer experience into a unified, strategic plan, and our clients report an average growth of 61% in annual revenue within two years of working with us.

Here's how we strive to give you clarity.

1. Define Your Branding - We'll define the core promise of your brand, your core messaging, and create imagery and collateral that makes it clear.
2. Deploy Clear, Effective Marketing - When those first two steps are complete, your marketing can engage your customers and drive growth.
3. Align Your Customer Experience - We'll examine every "touch point" where customers engage with you so your brand is clear in your day-to-day interactions.

We can help your business stop falling short of its potential and engage the right customers.

## ABOUT THE AUTHORS

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## Let's Dig Deeper

If you have any questions or want more information on fixing your brand, visit [beforeyoumarket.com](http://beforeyoumarket.com), where you can schedule a call today. All the worksheets referenced in this book are available for you on the website as well.

We've made it work dozens of times for brands just like yours. In fact, our clients report an average growth of 61% in annual revenue within 2 years of implementing our Brand3 Plan.

If you're interested in growing like that, visit [www.brand3.net](http://www.brand3.net) and schedule a free 15-minute phone consultation. We're ready to help your small business make a big impact.

# Empower Your Business with the **Right Way To Market**

Too many small business owners struggle with marketing. Worse yet, the most common issue behind the struggle is often buried deep and overlooked, resulting in a tremendous amount of wasted time, money, and opportunity.

If you are frustrated by your ROI on marketing, then *Before You Market* is for you!

If you employ the BYM principles, you'll be able to engage the right customers and get the results you've been looking for:

- More qualified leads
- Reduced costs
- Better returns on your marketing

Branding is the essential starting point for every marketing campaign, and a clear brand that connects with the right audience is attainable by businesses of every size.

**This book references worksheets which you can find on [beforeyoumarket.com](http://beforeyoumarket.com)**

*"This book is essential to any business owner who wants to build a strong brand, attract ideal customers and provide an excellent customer experience. I have used these marketing principles in my business to achieve record sales!"*

Chris Cocca  
Strategic Sales Consultant  
[chriscoccasales.com](http://chriscoccasales.com)

*"I wish I had read "Before You Market" before launching my business. Unfortunately I paid \$25,000 to a marketing firm that promised everything and delivered nothing. I now know the difference between marketing and branding and the secret recipe for a successful business."*

Bernadette Wagner  
Executive Director  
Prime Time For Women