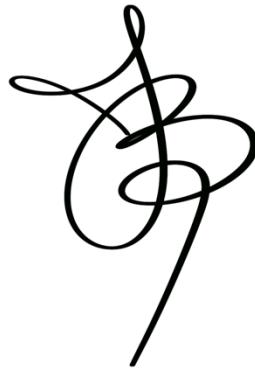


Branding and Marketing Strategy

Template and Workbook

This handy workbook will help codify all the elements of your organization's public image, marketing efforts, and measurement strategies. Having this information thoroughly detailed in one location ensures your organization's messaging is consistent.



Created by Dr. Jordan D. Boyd

JordanDBoyd.com
BoydJordanD@gmail.com

EXECUTIVE SUMMARY

(Brief Description of the organization. Who are you and what do you do?)

Background (Where did the organization start? How did it get where it is?)

Mission (core purpose and beliefs, everyday functions)

Vision (goals for the future, looking forward, use SMART goals)



ORGANIZATIONAL SUMMARY

Details about the organization's structure (ensembles, directors, leadership, etc)

Services and Partnerships (What do you offer? Who do you work with?)



Consumers Served (How many people engaged with your product?)

BRAND IDENTITY

Names/Titles (official organization name and names/titles of leadership)

Logos (primary public image of the organization, what does it convey?)



Colors (make them cohesive, each has a personality, use coolors.co)

Fonts (reflect the brand personality, pair them carefully, think versatility)

Verbiage (how to talk about the organization: point of view, pronouns, tense)



SITUATIONAL/COMPARATIVE ANALYSIS

Funding Climate (current financial situation, income streams and amounts)

Funding Outlook (future financial situation, what is changing?)



Comparative Analysis (Who are your competitors? How do they compare?)

PROFILE OF STAKEHOLDERS

Demographics and psychographics of your average consumer



SWOT ANALYSIS

Internal Factors

Strengths (+)	Weaknesses (-)
Tangible	Tangible
Intangible	Intangible
External Factors	
Opportunities (+)	Threats (-)



MARKETING STRATEGIES

Placement Strategy (What is your product? How is it delivered to consumers? How can you change/improve that product or delivery?)

Promotional Strategy (What tools will you use to publicize your product and how will you use each tool? Be specific.)



MEASURING STRATEGY

Justification and Methods (What do you hope to learn from measuring? What metrics will you use to determine the success of the marketing strategy?)

Monitoring and Calibration (once you have the measuring results, how will you use that information to adjust the strategies to be more effective?)



TIMELINE

A month-by-month plan of action including specific marketing tasks, measuring data collection/evaluation, social media plan, material creation plan, etc.

