



Brand Strategy Action Plan and Best Practices

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

Brand Integration Worksheet

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



Curated Coaching for Entrepreneurs

Best practices

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

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

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

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

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

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

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

Idea: Survey your customers and ask them to describe the store environment and experience, so you can see if their feedback is consistent with how you want to portray your brand. Use the results to refine aspects of your store.

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

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

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

Idea: If your brand personality is about helpful and friendly service, your return policies should be flexible.

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

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

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