A strategic brand workbook
for Startups
Brand is more than typography or a color palette: it’s a powerful strategic tool for companies to make better decisions, faster.

This workbook contains everything you need to take advantage of that. It’s a collection of tools that have been tried and tested. By the end of this 4 hour session, your company will be able to answer:

1. What’s our purpose?
2. What do we stand for?
3. Who are we trying to reach?
4. What makes us different?
5. What do we offer?
6. Where should we put our efforts

Let’s do this.
What do I need before starting?

1. A quiet space.

2. A whiteboard, markers, Post-It notes, Sharpies.

3. Your decision-making team ready to collaborate.

4. A printed version of this workbook.

5. A device to take photos and keep time.
How can I get the most out of the session?

1. Schedule the session in advance to guarantee everyone can come.
3. Take short breaks during the session.
4. Provide snacks and water (optional).
5. Assign someone to lead activities and take notes.

They will guide you during the activities, keep time and take photos of progress.

6. All activities have a suggested duration, but it’s just a guideline. Feel free to take more time if needed, especially if the conversations are productive.
7. Bring any data you have – it’s best to try base the exercises in facts rather than assumptions.
What’s our purpose?

Find the purpose of your company. Purpose helps you clarify where you’re heading, map short and long-term goals and engage your customers in lasting ways.

Simon Sinek’s Golden Circle
Golden Circle

1. Ask the group this question:
   a. “What do we do?” Describe the product you sell or service you provide.

2. Set the timer for 5 minutes.

3. Each person writes an answer to the question on a Post-It. Imagine you’re describing it to a 5 year old.

4. When the time is up, repeat with:
   a. How do we do what we do? Describe your secret sauce. It could be a specific technology or an innovative approach in the industry.

5. Now, read all your Post-Its aloud and place them on the whiteboard in the corresponding sections of the semicircles.

6. Use the rest of the time to decide which answer defines your final collective answer to each question. Feel free to write down a new version that combines two or three different Post-Its. If you’re not quite there yet, repeat the activity to get fresh ideas.

>> Don’t worry about finding the perfect word, you can polish it later. What’s important is reaching a consensus and getting a shared vision.
Golden Circle

WHAT

HOW

WHY
Golden Circle

WHAT
Eye-care service for people from lower socioeconomic backgrounds

HOW
With effective and quality treatment at the best price.

WHY
Because we strive to eliminate preventable blindness.
How Great Leaders Inspire Action - TED Talk
Simon Sinek has a simple but powerful model for inspirational leadership – he starts with a golden circle and the question ‘why?’

Start With Why
Insights about why people won’t truly buy into a product, service, movement or idea until they understand the ‘why’ behind it.

Find Your Why
With detailed exercises, illustrations, and action steps for every stage of the process, Simon Sinek helps you find your ‘why.’
What do we stand for?

Define the values that make you different.
Values uncover what’s at the heart of what you do. They are transmitted to your customers and help guide your company’s culture.
1. Set timer to 3 min.

2. Each person writes down things your company cares about on Post-Its (1 per value). Check page 12 for examples—but there are hundreds!

3. Place all your Post-Its randomly on the whiteboard outside the pyramid outline. This is your Value Pool.

4. Put 1 random post-it in the top section of the pyramid and 3 in the middle section. Any will do. Don’t put any in the bottom section.

5. Now, take turns. On their turn, each person can make two changes to the pyramid. Each of these counts as one change.
   a. Move one Post-It from one section to another inside the pyramid.
   b. Bring one Post-It into any section of the pyramid from the Value Pool.

   You can only have 1 Post-it in the top section and 3 in the middle. So, adding a new value often means ‘demoting’ the one that was already there to a lower section – or putting it back in the Value Pool.

6. Do this until everyone has had two turns.

7. After the final turn see if the pyramid makes sense to everyone. The value on the top must reflect your main priority as a company. If it still feels off, you may all make one more change each.

   What’s important during this exercise is that you prioritize your values and your pyramid finishes containing only what really matters to you.
Values Pyramid

1

3

N
Values Pyramid

Value Pool

Honesty
Sustainability
Technological
Reliability
Trustworthiness
Collaborative

Coaching
Inclusiveness
Healthiness
Superior service

Different
Happiness
Surprising
Caring

Reliable
Diversity
People-focused
Effective

Superior service

People-focused

Diversity

Effective

Healthiness

Honesty

Coaching

Sustainability

Inclusiveness

Technological

Reliability

Trustworthiness

Collaborative

N

3

1

Different

Happiness

Surprising

Caring

Reliable

Diversity

People-focused

Effective

Trustworthiness

Collaborative

Technological

Reliability

Sustainability

Honesty

Coaching

Inclusiveness

Superior service

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Diversity

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Healthiness

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Superior service

People-focused

Diversity

Effective

Healthiness

Honesty

Coaching

Inclusiveness

Superior service

People-focused

Diversity

Effective

Healthiness
Delivering Happiness: A Path to Profits, Passion and Purpose
The CEO of Zappos shows how a different kind of corporate culture can make a huge difference in achieving remarkable results.

The Value Driven Business: The Simple Strategy To Create A Business You Love
Get to know a different approach – build a business by connecting with customers on a deeper level.

The Untold Story of Buffer’s Values: Why We Created Them, and Why It Hurt
Get insights from Buffer’s retelling of their process of defining their own values, how they did it and how it affected their business.

Make Your Values Mean Something
Turn your values from Post-It notes into ideas that are lived through your whole company.
Who do we want to reach?

Identify what your users need. If you try to reach everyone at once, you’ll end up reaching no one. Finding what your users really need maximizes your time and money.
1. Think about the main type of person that gets the most benefit out of your product. A person that embodies your typical user. Just focus on one for now.

2. Set the timer to 10 minutes and work as a team to fill in the blanks in the User Statement:
   a. Give your person a name and write it in the first blank of the User Statement.
   b. Think about your user’s context: What’s their situation before they found your company? Put it in the second blank of the User Statement.

3. It’s possible to have more than one user. If so, repeat the activity. Remember, these are ‘general types’ of users, so don’t try to profile every single person. Most products have between 2 - 5 users.

Example: Busy parent with no time to cook healthy food for their kids.

1. Think about your user’s need. What do they mainly want to accomplish while using your product or service. Put it in the third blank of the User Statement.

   Example: An easy way to feed their kids without compromising on nutrition.

2. Think about your user’s desire. What do they truly want? What’s the motive behind their actions? These are often more emotional or abstract. Put it in the fourth blank of the User Statement.

   Example: Giving their kids the best and feeling like a good parent.
User Statement

_________ is a ____________________________________________

who needs a ____________________________________________

because she/he values ______________________________________

________________________________________________________
User Statement

Jack is a uninsured elderly man with cataracts who needs a

an affordable visual health service because she/he values

the opportunity to see again and not putting his family into debt.
How to Create UX Personas
Understand why you need to develop user personas and how you can further develop them.

How to Understand User Motivations
Learn about the research tools and exercises you can use to understand your users’ motivations.

Psychology in Design. Principles Helping to Understand Users
A great read to help you understand your users’ true intentions.
What makes us different?

Define your strengths and weaknesses. Your strengths and weaknesses are what your competing on. They help differentiate you in the market.
1. As a group, discuss what your competitive advantages and differentiators are.
   
   >> To help you out, look back at the Values Pyramid or the ‘how’ from the Golden Circle.

2. Choose 2 main competences to become each axes of your chart.

   Example: if one of your competencies is ‘technological’ your x axis would go from ‘least technological’ to ‘most technological’

4. If you already know who your competition are, write one competitor per Post-It and you place them in the matrix where you think they fit.

5. If not, take 5 minutes to quickly research the competitive landscape (you can dig deeper later) and place your competitors inside the matrix.

6. Now place your own company inside the matrix.

   >> Placing the first competitor inside the matrix might be hard, but once you start it’ll get easier. Remember that this matrix will be changing constantly.
Competition matrix
Competition Demystified: A Radically Simplified Approach to Business Strategy
Understand the competitive structure of your industry and develop strategies for your specific position in it.

Competitive Strategy: Techniques for Analyzing Industries and Competitors
Get the fundamentals on competition from one of the most recognized Harvard Business School professors.

Uncopyable
Learn how to create an advantage that your competition cannot easily copy.

David and Goliath: Underdogs, Misfits, and the Art of Battling Giants
Understand how small companies can win against big corporations through a series of stories where the underdog wins against the giant.

The Art of War for Small Business
Apply Sun Tzu's *Art of War* wisdom to the small business arena.

The CEO of Buffer on Culture, Competition, and Transparency
Get insights on startup competition from Buffer CEO Joel Gascoigne.
What do you offer?

Articulate your value to others.
Your positioning encapsulates what you’re selling, who it helps, what it does, how it does it and why it’s different.

OUR __________
HELPs __________
TO __________
BY __________
UNLIKE __________

Positioning
1. As a group, fill in the blanks of the positioning statement:
   a. **Our**... Write down what kind of product or service you have.
      Example: Hiring Platform, etc.
   b. **Helps**... Write down the context from your user personas
      Example: Busy parents, jobless freelancers, etc.

2. Stand back and **discuss** each field openly with the team until you agree.

   c. **To**... Think about your users’ shared goal. What do they want to use your product to do? Write it here.
      Example: Find a well-paid job without attending interviews.

   d. **By**... Write down what your product/service does to help them achieve their goal.
      Example: Matching profiles between companies and candidates.

   e. **Unlike**... Write down the way your users used to achieve their goal before your product.
      Example: Wasting time applying to worthless positions.

30 - 45 MIN

**DRAW THE OUTLINE OF THE POSITIONING STATEMENT (NEXT PAGE) ON THE WHITEBOARD**
Our ____________________________
helps ____________________________
to ______________________________
by ______________________________
unlike ___________________________
Our hiring platform helps jobless freelancers find a well-paying job without going to interviews by matching candidates profiles with companies unlike wasting time applying to positions that aren't a fit.
Positioning Statement

ADDITIONAL RESOURCES

1. *Value Proposition Design: How to Create Products and Services Customers Want*
   This book will give you the tools so you can understand what you need to create products that sell.

2. *Brand Identity Breakthrough: How to Craft Your Company’s Unique Story to Make Your Products Irresistible*
   How can you tell the story of your business? Develop a strong brand identity by combining your personality and values with the value of your products.
Where should we put our efforts?

Build your identity.
Your identity is the face of your brand. It should align the visuals, voice and experience of your brand to the strategy you just created.
Brand Journey

30 - 45 MIN

DRAW THE OUTLINE OF THE BRAND JOURNEY (NEXT PAGE) ON THE WHITEBOARD

1. Set the timer for 10 minutes.

2. Everybody writes each moment when a user directly interacts with your brand on Post-Its (one per touchpoint). Examples could be digital, physical, promotional, etc.

3. Read each Post-It and place it on the whiteboard, under the corresponding stage.

4. Prioritize and mark which are highly valuable and/or easiest to implement.
   a. Product Awareness: Where does a new user hear about your company?
      Examples: Facebook ads, blog posts, referrals, etc.
   b. Value Communication: Where do you tell your user more about what you do?
      Examples: Website landing page, sales presentation, etc.
   c. Use of Product: What are the key moments of using your product/service that make it unique or differentiate it from your competitors?
      Examples: Animated elements during the sign-up, one-click purchase, notification sounds.
   d. Post-Use: How do you keep users engaged after they’ve used your product/service?
      Examples: Follow-up emails, discount coupons, loyalty rewards, customer support etc.
<table>
<thead>
<tr>
<th>BRAND AWARENESS</th>
<th>VALUE COMMUNICATION</th>
<th>USE OF PRODUCT</th>
<th>POST-USE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing efforts. How does a new user hear about our product?</td>
<td>Selling efforts: Where do you tell your user more about what you do?</td>
<td>What are they experiencing?</td>
<td>How do we keep them engaged after use?</td>
</tr>
</tbody>
</table>
Brand Journey

**BRAND AWARENESS**
Marketing efforts. How does a new user hear about our product?

Facebook Ads
TV Ad

**VALUE COMUNICATION**
Selling efforts: Where do you tell your user more about what you do?

Landing Page
AppStore
*App Screenshots

**USE OF PRODUCT**
What are they experiencing?

Onboarding
*Animation
...
...

**POST-USE**
How do we keep them engaged after use?

Newsletter
Customer Support
Brand Journey

ADDITIONAL RESOURCES

1. *This is Service Design Thinking: Basics, Tools, Cases*
   Get key insights from 23 industry experts about the interactions between the service providers and the customers.

2. *What Customers Crave: How to Create Relevant and Memorable Experiences at Every Touchpoint*
   Understand more about what makes a great experience.

3. *Experience Design: A Framework for Integrating Brand, Experience, and Value*
   Get the technical details about how to integrate your processes with your brand values.
Great Work!

You’ve just taken your first step towards building a solid brand strategy with the power to drive your decision making. The next step is to stand back and let the pieces interact:

- Do your values represent your ‘why’?
- How does your positioning reflect your place in the competitive matrix?
- Are you overpromising?
- Are your insights realistic and sustainable?

We’d love to help you make these checks by reviewing your workbook.

Get in touch at hello@23.design

Note: all information will be treated with the same confidentiality we extend to our clients.