

design phase checksheet

- phase 0: kickoff
- phase 1: research & discovery
- phase 2: clarifying strategy
- phase 3: designing identity
- phase 4: creating touchpoints
- phase 5: managing assets

phase 0: kickoff checklist

- 0.1 needs analysis
- 0.2 estimate / proposal
- 0.3 contract
- 0.4 project plan
- 0.5 client packet sent for review
- 0.6 kickoff meeting
- 0.7 document findings

needs analysis

- needs analysis
 - review the form for insights
 - need insight sheet
- estimate worksheet based on completed needs analysis form

kickoff meeting

- walk through document allowing time for thought and consideration.
 - review needs analysis
 - review purpose of design
 - review tone look and feel
 - review collateral needs
 - review estimate / proposal
 - go over contract
- review project plan
- thoughts, concerns and changes
- sign off

phase 1: research & discovery

- clarify vision, strategies, goals, & values
- stakeholder audit
- market research
- competitive audit
- marketing audit
- language audit
- legal audit
- process audit
- document findings

clarify vision, strategy, goals & values

- examine business plan
- what are the business goals
- what is the business mission & vision
- what is the target market

stakeholder audit

- identify stakeholders
 - internal
 - connected
 - external
- prioritize stakeholders
 - power / interest matrix
- understand your stakeholders
- request baseline information
- interview stakeholders
- document learnings

market reasearh

- qualitative — primary
- observational research
 - ethnography
 - mystery shopping
 - indiviual interviews
- quantatative —secondary
 - industry reporting
 - SWOT, segmentation, and 5 forces
 - CDSTEP
- document learnings

competitive audit

- identify competitors
 - FAB, strengths, weaknesses
 - services
 - seo
 - yelp and other rating sites
- competitors branding samples
 - logo, color, type & language
 - mission, vision, culture, tagline & mantra
 - positioning, value proposition & usp
 - website, social media, & content
 - advertising
 - web, t.v., radio & print
 - environmental, packaging & pos
- document learnings

marketing audit (new brand)

- define the market(s)
- understand consumer behavior
- create user personas
- segmentation, targeting and positioning
- FAB & marketing mix (4-P's)
- value proposition & unique selling proposition
- channel & supply chain
- value communication —story brand
- document learnings
- write marketing plan

marketing audit (rebranding)

- understand the big picture
- request materials
- create a system
- solicit information
- examine materials
- examine identity
- examine how things happen
- document learnings

audience checklist

- audience
 - segment
 - demographic
 - psychographic
 - stakeholders
 - create user persona
- document learnings

segment jobs worksheet

segment:

demographic:

psychographic:

create user persona:

phase 2: clarify strategy

- clarify brand strategy
- develop positioning platform
- create brand attributes
- write brand brief
- create naming strategy
- develop key messages
- write creative brief

phase 3: designing identity

- brainstorm big idea
- design brand identity
- explore applications
- finalize brand architecture
- document learnings
- present visual strategy
- achieve agreement

phase 4: creating touchpoints

- finalize identity design
- develop look & feel
- initiate trademark protection
- prioritize & design applications
- present visual strategy
- apply brand architecture

phase 5: managing assets

- build synergy around the new brand
- develop launch strategy & plan
- launch internally first
- launch externally
- develop standards and guidelines
- nurture brand champions