

The Brand Playbook™

This is where it starts

Welcome to Brand Mastery™ and congratulations for making this investment in yourself and in your business. The fact that you are taking this journey tells me you are serious about creating progress.

I spent nine months planning and producing this program, and I put my heart and soul into it. I went through several iterations, doing my absolute best to turn complex theories, years of practical experiences and tested principles into simple, actionable lessons and exercises for you. Despite my best efforts, I know this course will require quite a bit of effort on your part. But let me assure you, it will be worth it. Dare I say, if you put your heart into this program and do the best you possibly can, you can expect to transform your brand and business. In fact, unless that happens, I have failed. My goal is that you implement the ideas and strategies in this program, and then go on and transform not just your business, but also your life. I've seen this happen many times, so forgive me if I seem overly optimistic.

This Brand Playbook has two functions. First, it works as your workbook as you work through all the modules and lessons. And once you are finished, it will serve as your playbook, your operational guide for building the future of your dreams.

If there was only one piece of advice I could give you it would be this; commit yourself fully to making this happen. At times, it will feel difficult. But keep persisting, and you will succeed. As with almost anything in life, you will get out what you put in. Commit. Schedule the time. Make it happen. I believe in your potential and in your ability to create a total brand and business transformation. Let's do this!

Tobias



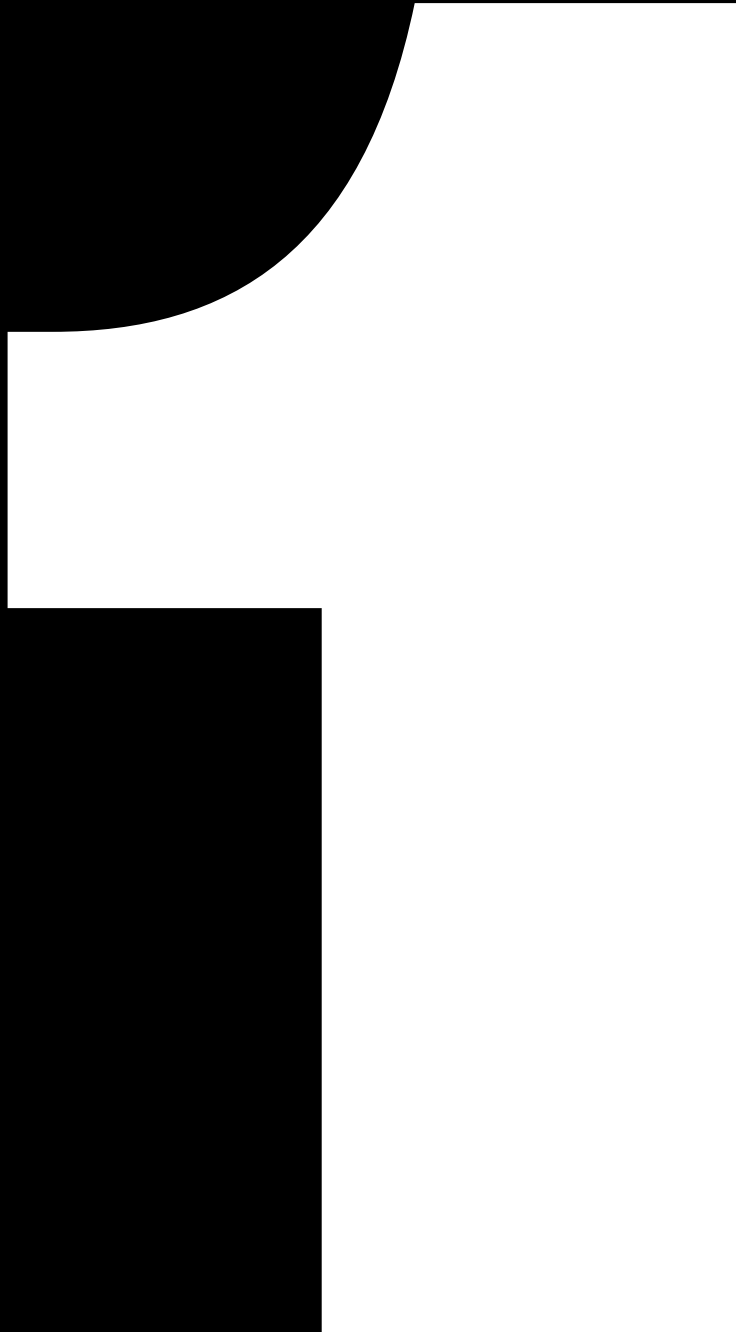
Tobias Dahlberg
Instructor
Founder of The Future Academy

This is the beginning of your transformation. Remember, your results will be directly proportional to the effort you put in. Let's do this!

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Foundation



Module overview

In this module, you will explore and define your brand philosophy, i.e., the underlying beliefs, attitudes, mindsets, and knowledge that affect the decisions and behaviors taking place in your company.

One of the primary reasons companies fail to build high-performing brands is not only because they lack the skills of brand building. It is because they lack the foundational philosophy and psychology needed to build extraordinary brands. Typically, a company has one dominant force that affects its collective thinking and culture. More often than not, this dominant force can be traced back to either the founder, entrepreneur or CEO.

This dominant force is rooted in their ideas, beliefs, attitudes, and knowledge about brands, their importance, and how brands are built. Unless this “worldview” is congruent with how brand-building works, you will eventually run into trouble along the journey. This is why this module is so important. Now is your chance to reflect on both on the current reality (your current brand philosophy), and to gain crucial new knowledge that will change how you go about brand-building going forward.

To create lasting change, don't start with “the how.” Instead, start with “the why”; i.e. ensuring that you are working from a healthy set of beliefs and mindsets about what you are setting out to achieve, how brands really work, and how you might need to adopt new ideas, beliefs, attitudes, and mindsets across your organization to create the transformation you're here to create.

The Foundation module is about reflection and learning. To make the most of it, watch all the lessons and reflect on how they match your current thinking (your own, but also everyone in your company). Also, take time to think about your true potential, your ambition, and which beliefs, attitudes and mindsets you might want to question and replace to set yourself up for building a brand that your ideal customers will think of as their only choice.

This first module is quite content heavy (2h and 1 minutes to be precise). My idea has been to introduce all the major concepts and principles before we start getting our hands dirty, working on your brand transformation. We will revisit many of these principles, however they will not feel foreign to you then as you are busy transforming your brand and business.

This week's assignments are a bit lighter than the ones coming up in the following modules. However, they are critical, so make sure you take the time to think and reflect.

You invested in this program, and I am sure you want to get as much out of it as humanly possible. As I said in the intro, you will get out more or less what you put in. So please make sure you put in your best effort. You won't regret it.

Are you ready? You can do this!

– Tobias

The Only Strategy

The concept

The Only Strategy is a strategy and formula for building a unique brand that you can grow profitably. It is a highly focused strategy aimed at helping you leverage your resources where they matter most.

The Only Strategy starts with the premise that being considered “the only viable choice” by as many customers as possible is the holy grail of business. When you do something valuable for people that no one else does, you set yourself up for success in all the three areas in which you can create revenue for your business; a) having more customers who buy b) having customers buy more c) having customers buy more often.

Being seen as the only choice means people are likely to buy more, more often, and at higher prices, without switching to other brands. When you have customers who think of your brand as their only choice, you have what I call a Power Base. Your Power Base is made up of the people that like or love your brand the most, and hence they will often be your best sales and marketing advocates. They are your “warmest” customers, and therefore your most valuable business asset.

This is the exact opposite of being seen as “one choice among many”, which is the worst place in business. It means you are seen as similar, mediocre or even boring. Being seen as similar means you have little or no chance of charging a premium, and people have very low switching barriers, meaning they will always be ready to choose any other brand that is cheaper or more convenient for them.

The Only Strategy, hence, is the best approach to protect yourself against commoditisation, to boost profitability and set yourself up for fast growth.

The principles

SERVE ONLY THE RIGHT CUSTOMERS

To build a unique brand, first focus on finding the “smallest viable market”, i.e., a group of ideal customers for whom a) you can potentially become the only choice and b) that have the potential to give your business (money) that generates profitable. Weed out all bad customers and ignore serving segments and needs where you cannot make a profit.

DO SOMETHING FOR YOUR CUSTOMERS THAT NO ONE ELSE DOES

Design your brand and your offering to deliver exceptional value for your ideal customers. By doing something so exceptionally valuable for them that no one else does, you will become their only choice. This is the key to building a unique brand.

DO ONLY THE VITAL FEW THINGS THAT REALLY MATTER

Not all activities are equally important. Some are exponentially more important than others. Build a simple and profitable value delivery system. Remove all the activities and resources that do not provide exponential returns on your effort. All unnecessary activities and costs will only dilute your uniqueness and hence, also your profitability and brand position.

GROW FROM YOUR POWER BASE

The Power Base is made up of your best customers, those that fit your unique ability to satisfy their needs in exchange for profitable revenue. The most profitable way to grow your brand and business is by satisfying your existing customers, investing in the relationships, and delivering value to increase the frequency and size of their purchase. In addition, focus your marketing and sales efforts on finding more similar customers. Don't expand your business into serving new needs and segments before you have grown your Power Base to the maximum. Keep your operations tightly focused, simple, and agile. Never grow an unprofitable business; instead, learn to turn a profit before you scale and grow.

The Only Formula

The Only Formula is the step-by-step application process for applying The Only Strategy, and building an “only choice brand” that scales profitably. The six steps in the formula correspond with the six modules of the program, also called The Six Areas of Brand Mastery. Think of these as the main actions related to each of the modules.

Step 1: Master the fundamentals

Before doing anything else, make sure you have a thorough understanding of how brands work, and the underlying philosophy, i.e., the worldview, beliefs, attitudes, and knowledge you need to adopt. Unless you (and your team) are in the right mindset, you will likely not make the right decisions going forward. So before you do anything else, define your ambition, and adopt the right philosophy toward building a brand that will transform your business. It will be worth it.

Step 2: Discover your Power Base

There is only one source of revenue for any company. That is the customer – anyone who pays you money in exchange for value. But not all customers are equal in terms of how valuable they are to your business. In Module 2, you will work to identify your Ideal Customer, then research your customers to create a Customer Blueprint. Your Ideal Customer is a representation of the type of customers you want – your best customers. Together, they make up your Power Base – your most valuable business asset. Your best revenue and profit will come from this group of “best customers”.

Step 3: Define your Onlyness

Once you know who your Ideal Customer is and what this group of people values, you need to define your uniqueness, also called your Onlyness. Your Onlyness is the thing that you will do for your customers that no one else does. In other words, it is where your unique strength meets the dreams, hopes, and aspirations of your Ideal Customer. Your Onlyness is likely to be (but not necessarily) something else than your product or service alone.

Step 4: Design your extraordinary brand offering

Once you know who your Ideal Customer is and what this group of people values, you need to define your uniqueness, also called your Onlyness. Your Onlyness is the thing that you will do for your customers that no one else does. In other words, it is where your unique strength meets the dreams, hopes, and aspirations of your Ideal Customer. Your Onlyness is likely to be (but not necessarily) something else than your product or service alone.

Step 5: Engage for exponential growth

The fifth step is to create a plan for how you will engage your customers with your brand. Engagement is simply the process of developing relationships. The Only Strategy™ works best if you think of your Power Base like concentric circles. Wherever you are today, whether you Power Base consists of one or 10.000 customers, you want to stay extremely focused on these people and have them engage with your brand to create advocacy, loyalty and growth. Never lose touch with your existing Power Base, keep nurturing them while you look for new, similar customers to expand that base of profitable, happy customers.

Step 6: Operationalize your brand

The last step, and Module nr. 6 is where you put together all your plans and ideas into an operational master plan. Here the core premise is; “your brand is your business, and your business is your brand”. Your business strategy and your brand strategy should be completely integrated, and you want all your business functions to now to work in unison with your new brand masterplan. Operationalizing your brand means designing a simple, yet powerful value delivery system built around the vital few activities that really matter, weeding out all the unnecessary and unprofitable.

Exercise: My results



Write down the three most important outcomes you want from this program. Set your expectations high, then commit to making them happen.

1

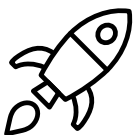
As a result of this program, I want...

2

As a result of this program, I want...

3

As a result of this program, I want...



Take at least 5 minutes to think about this. Shut off all distractions. Take a few deep breaths. Use your imagination. What do you really want? What excites you?

Envision the outcome as already accomplished. How would it make you feel? What would it mean for you if you achieved this goal?

Write down your outcomes. Really, do it. Your first step in gaining clarity and momentum is writing down a goal that provides you with clarity, inspiration, and direction going forward. After you have written it down, commit to it. Own it. Decide that you will make this happen, no matter what.

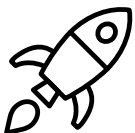
Exercise: My commitment



Don't just wish for change to happen, decide and commit to making it happen. Write down what you will commit to in order to make the most out of this program. Put it into your calendar, or it won't happen.

1**I commit myself to...**

2**I commit myself to...**

3**I commit myself to...**

We all want progress. However, only a few of us are willing to do whatever it takes to make change happen. Make a real commitment to yourself upfront. Decide what results you are going to create and set the standards and mindset for yourself. There might come times when you feel overwhelmed, stressed, or

when you cannot find the time or motivation. In these moments, revisit your Why, your ambition. Think about what the price of not following through with your best intentions will cost you. Remember, you can do anything you set your mind to if you want it badly enough.

Key learnings



Time to bring it home. What were the most important things you learned from this module, and how will it affect your thinking and behavior going forward?

Don't overthink this, simply reflect on what you learned and write down the things that intuitively feel the most important to you and your business. Reflect on how they could change your thinking and your behavior, or how it could change your culture or your operations.

We will revisit many of the principles during the following modules, however, writing down your thoughts and ideas along the way will benefit your creative output.

Exercise: Brand philosophy



Based on the Foundation module, what are the most important beliefs, attitudes and principles you need to adopt to create your transformation?

Also consider which current beliefs might limit you from making progress.

















Actions to take



Action

By when

Done

1

2

3

4

5

6

7

8

9

10

***Well done so far!
Remember,
persistence is the
price of success!
Do whatever it takes.***

Recruit 5 Ideal Customers

In the next module, you'll learn all about the Ideal Customer. For now, however, think of your Ideal Customer as your best potential customer, someone who needs what (only) you provide, and that can give you what you need (money, impact, etc.) For you to learn from your Ideal Customers, now is an excellent time to reach out to at least five of them and ask them to participate. This way, you'll eliminate much of the guesswork later in the program.

Step 1

We will dive deeper into this in Module 2; however, for now, go with your gut and describe the key characteristics of your ideal customer. Think of what criteria your ideal customer meets. For example:

- Starting entrepreneurs who live in the London area
- Want to outsource social media marketing
- Are willing to pay a fair price for excellent service
- Already have a product that sells
- Don't have an in-house resource
- Want to double their business in the next 12 months
- Already understand how social media works

Something like this would do for now.

Step 2

Reach out through your own networks and really try to recruit at least five potential customers. It will be crucial for gaining insights. You can recruit more if you like, but around five will be a good amount for now. You can always validate your results against a larger population later.


It's too easy to skip this step. If you cannot get anyone to participate, you will have to go with your intuition, and you can always do this later. However, the research results can dramatically affect the work you do in this program, so really try your best to make this happen. Remember, nothing great comes without going the extra mile.

My ideal customer is...

They want...

Contact template

You can modify and use this text to reach out to your ideal customers.



To: [your ideal client name]

Subject: Would you do me a little favor?

Hi [Insert name]

Hope you are doing well. Hey, I am enrolling in this program called Brand Mastery™ and my goal is to create something of massive value for people like you. I am reaching out to only a few selected people, and as you are a person I respect, I was wondering whether you would grant me the privilege of participating in 2-3 interviews to help me get a deeper understanding of how we can create more value for you. If this sounds good, we would just need first schedule a 45-minute interview (live, Skype or phone). I will ask a few open-ended questions about your preferences and motivators in the context of [insert your category here].

Would you be so kind to do this for me? I would highly appreciate it.

Best regards,

[your name]

The idea is to involve five ideal customers for 1-3 sessions during the program (ideally three!).

In the first session, which can be a 45-minute phone call, Skype interview or a live meeting, you will use a template to ask specific questions about their preferences and drivers.

In the second session (30 mins), you will show a prototype of your brand offering to get feedback and learnings from them.

In the third session (30 mins), you'll come back one more time for final validation from your Ideal Customer.

Customer



Module overview

The Customer module is dedicated to making choices about which customers to focus on, and to make sure you understand them better than anyone else. Without understanding their dreams, hopes, fears and aspirations, how can you ever be successful? Just think about it; your whole business is predicated on customers choosing you.

Without customers deciding to choose you over other alternatives, you won't have a business. Therefore, getting crystal clear about who your Ideal Customer is, and digging deep into their minds to uncover their psychology is what sets you up for success. This will eliminate the constant guesswork so many companies engage in, as they lack real customer insights.

**THIS MODULE
WAS DESIGNED
TO HELP YOU:**



Shift your perspective to become truly customer-centric.



Gain breakthrough customer insights by collaborating with real people.



Focus on a specific group of customers, category or market where you can create exceptional customer value.

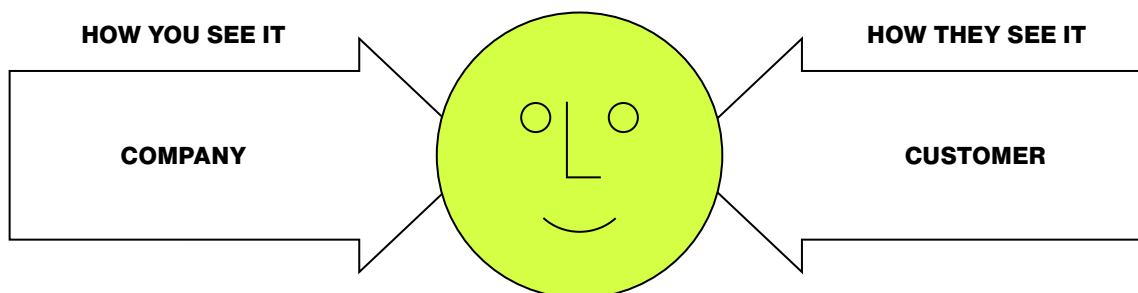


Create your own Customer Blueprint, an insights document for decision-making and inspiration.

This module is extremely important, so make sure you give it your best!

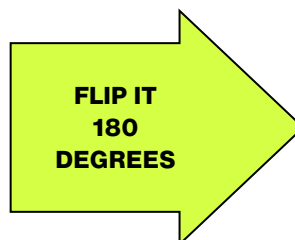
The One-Eighty

The One-Eighty is about shifting the vantage point of your business by 180 degrees. Instead of looking at the world from only your own viewpoint, change your perspective to see the world from the perspective of your customer. It will help you re-frame the questions you ask yourself, enabling innovation and streamlining your business operations to focus only on what matters to customers. When you are customer-centric, you make the customer and their perception of value the driving force of your business. Stop creating better products, start creating better customers!



Consider how flipping the question from “you” to “them” could affect your business. This is a very powerful framing and re-framing exercise, which could completely change the game for you.

“HOW CAN WE GROW YOUR BUSINESS?”
 “HOW CAN WE BRAND OUR PRODUCT?”
 “HOW CAN WE SELL MORE?”
 “HOW CAN WE GET MORE FOLLOWERS?”
 “HOW CAN WE DIFFERENTIATE OURSELVES?”



“HOW CAN WE GROW YOUR CUSTOMERS?”
 “HOW CAN WE BRAND OUR CUSTOMER?”
 “HOW CAN WE HELP MORE CUSTOMERS?”
 “HOW CAN WE BECOME WORTH FOLLOWING?”
 “HOW CAN WE DIFFERENTIATE OUR CUSTOMERS?”

Exercise: The One-Eighty



Write down the most typical business questions you ask yourself. Then re-frame the same question to make it completely customer-centric. Spend a few minutes brainstorming how asking a different question could lead you to change your business. This is a powerful exercise worth revisiting many times during the program.

Your business question:

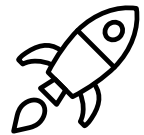
Your customer question:

Your business question:

Your customer question:

Your business question:

Your customer question:



Think of the questions, problems or opportunities you are currently working on.

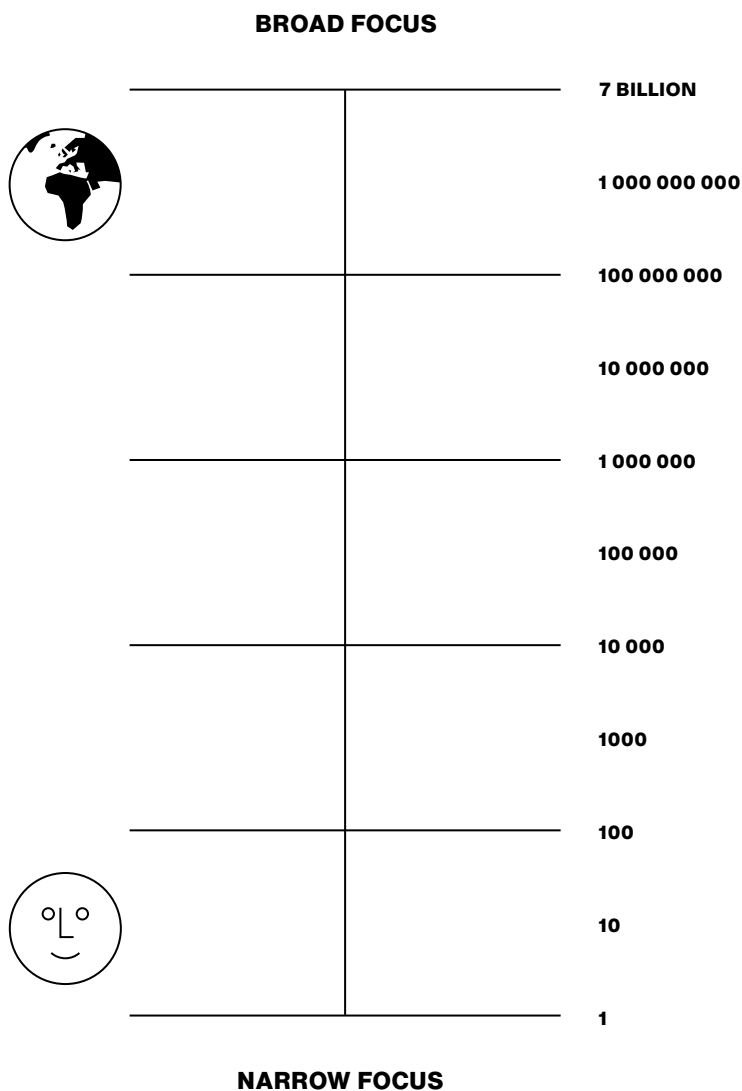
Write down 1-3 questions, then “flip” the question by framing it in a way that is as customer-centric as possible.

For example:

“How can we grow our business?” could be flipped into “How can we grow our customer?”, or “How can we increase our margins?” could be flipped into “How can we create exceptional value for our customers, justifying a higher price”?

Powers of Ten

The Powers of Ten exercise is designed to help you zoom in on the right size of the market. The idea is to start with “the smallest viable market,” then creating exceptional value for that market, allowing you to build a strong brand that scales and grows. The most common problem is that companies try to chase a market that is too big for them, leading them to be crushed by the competition.



In the exercise, describe your market in a few sentences. Write it from the perspective of the customer and their needs. Try it a few times, adding more detail to zoom in on a smaller market, and removing detail to zoom out and broaden your market. For example, you might add occasion (when) to narrow your market. Spend time thinking creatively about where your market opportunity lies.

For example, if you are starting a new business, you might go for a market of only 10 customers. You might not need more to get going, and by being super-focused, you will likely grow to the next “power of ten” much faster than through a broader approach.



There are 7 billion people on earth. Being “all things to all people” would mean trying to sell everything to everyone, which would obviously be a ridiculous idea. And the opposite would be to choose a market of one.

Find your right “altitude,” and then always go for the next 10x, the next power of ten. You can do this by broadening your market definition, or simply by finding more customers. I always prefer the second option.

Powers of Ten example

In the example below, you will see four different ways to define a market for office space, from a very broad definition to a focused one. As this company starts innovating its product and marketing it, which definition do you think will be most helpful to them, as they set out on their journey to find their first customers? The answer, of course, is the most focused one. Never define your market too broadly.

BROAD FOCUS

		
		“Small businesses around the world”
		“Small businesses with less than ten employees who want a flexible office space”
		“Small businesses with less than ten employees who want a flexible office space with a strong-knit community of like-minded creative professionals, in the San Fransisco area”
		“Solopreneur video-creators in the San Fransisco bay area who want a flexible, plug-and-play office space, a strong-knit community of like-minded peers, and want access to studios, resources and physical storage space.

NARROW FOCUS

The smallest viable market



Now it's your turn. Define your market. Define it so narrowly that you can create exceptional value for customers, leading many of them to think of your brand as their only viable choice. It's tempting to chase a large market, but beware, just like on a big Sunday market, you might just get lost. Pursuing the mass means making compromises, leading you to become mediocre. What is the smallest viable market for you? In other words, how small can you define your market, while still sustaining your business? What is a "corner" of a market that has been underserved or ignored for too long? How would you define that market? Write at least 5 definitions on a piece of paper before you define it below.

1

Our brand is for...

2

They believe...

3

They value...

The Power Base

Who are in your Power Base?

The real value of your business lie in the quality of the relationships you have with your best customers. Everything you do eventually comes down to what kind of customers you have, because not all customers are going to be equally valuable. Your Power Base is the group of customers that are the most valuable to your business, your “super customers” if you will. To build a unique and profitable brand, define your Power Base, then nurture and grow it.

If you currently have a business, and if you were to analyze where the majority of your sales come from, you would likely find the good old 80/20 Principle at work. This principle says that in practically every area of life and business, around 20% of the inputs create approximately 80% of the results. To put it simply, not all causes create the same effects. And so it is with your customers too.

If you have a CRM and you are in the b2b space, this is easy to verify. The chances are that around 20% of your customers create about 80% of your sales. This also means that 80% of your customers create only 20% of your sales, which might eat up a lot of profit and focus from your business.

Now also imagine the following. If you have a 1 million dollar business, and you make 100.000 in profits, it would mean that only 200.000 of that 1 million in sales generated 80% of your profits! What would account for such a thing to be true? My guess is you would be selling a properly priced product to people who really want it. And, it could be that they would be repeat purchases, coming from happy customers, saving you the sales cost. Whatever the reasons are, you should get to the core of it and re-align your focus to

build your business around that profitable core. At the root of all profitability lie customers who are willing to pay a premium for your product or service. These are likely to be your most profitable customers. Profitability, then, is one of the most important criteria for your Power Base.

Your best customers are often your happiest customers. You do something for them that makes them tick, and this means they are likely to be your best marketing people too. They refer you to their friends, and they root for you. Therefore, your Power Base is your most crucial business asset.

The Power Base is central to The Only Strategy, which says that to build a unique brand and a highly profitable business, you must focus only on the right type of customers, providing exceptional value to them, and ignoring everything else. The reason for this is simple. Your best customers are your most profitable customers, and by attracting more of them, you are building the most valuable asset you can have – i.e., customers who think there is no viable substitute for your brand, and who come back to buy more, more often, and at high prices. This is why building an “only choice brand” the holy grail of business.

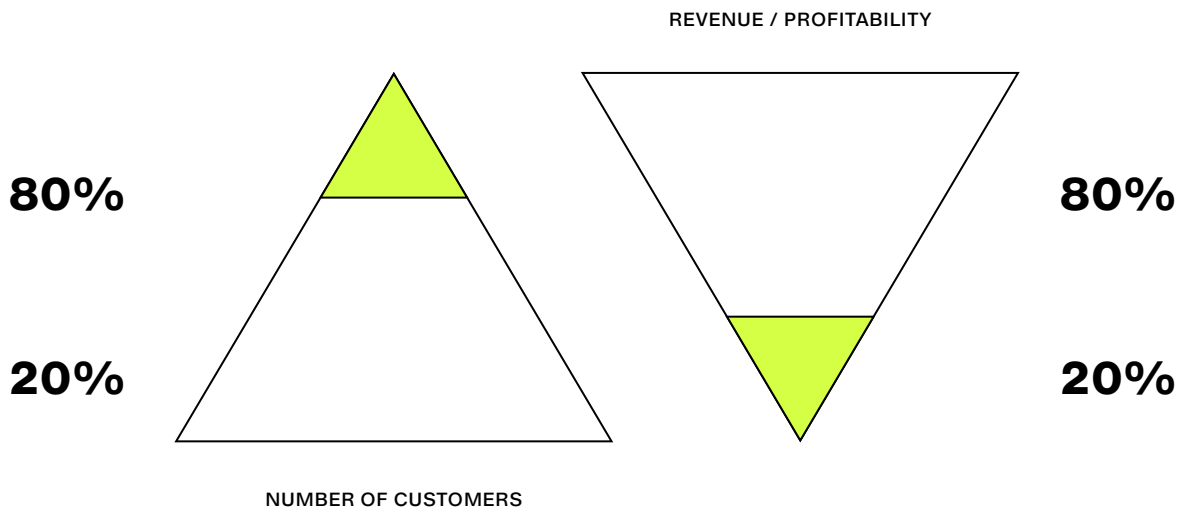
This is the exact opposite of being seen as “one choice among many”, which is the worst place in business. It means you are seen as similar, mediocre, or even boring. Being seen as similar means you have little or no chance of charging a premium, and people have very low switching barriers, meaning they will always be ready to choose any other brand that is cheaper or more convenient for them.

Now, the question is, do you already have a Power Base? And if you do, what are the criteria for your Power Base?

The Power Base



About 20% of your customers will account for around 80% of sales. And the same applies to profits. Here lies the key to building a profitable brand and business. You must focus only on the top 20%. But who are they? Well, you'll be the judge of that. You will set the criteria yourself. Just don't forget the most important criteria; profitability. Without money, you won't grow, and without growth, you won't make much of an impact in this world.

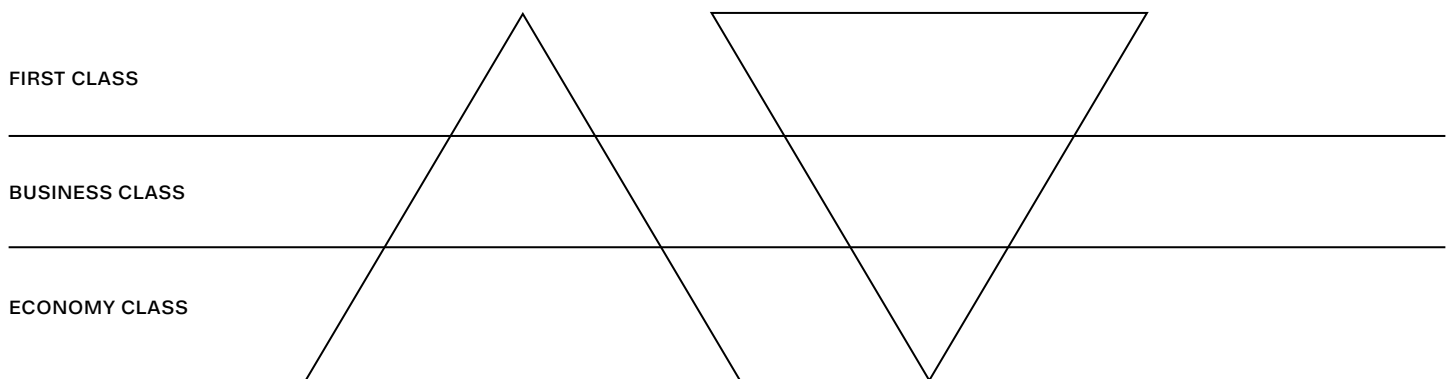


Who are the best potential customers for your brand and business?

What makes them your best customers?

The Power Base

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First Class

First Class Customers are your dream customers, your ideal customers. They probably buy the most, they bring in the most profits and meet other criteria you might have as well (e.g. great to work with, promotes your brand, etc. This group might typically represent 5-10% of your customer base.

Business Class

Business class customers are your “good” customers. They bring in profitable revenue, although not as much as your First Class Customers. They are good to keep and try to turn into First Class Customers. This group might represent 5-25% of your customer base.

Economy Class

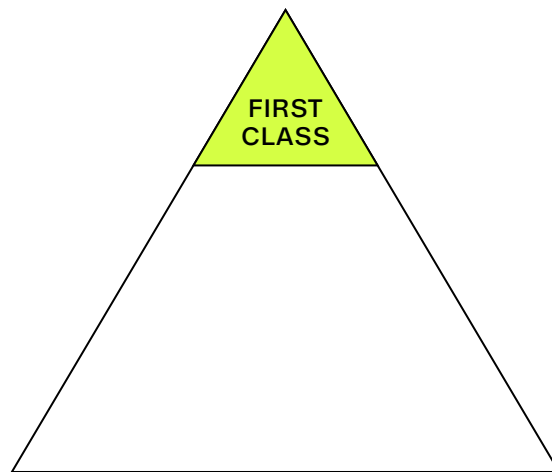
Economy Class Customers are “the rest”. They are people with whom you don't have a special relationship, they don't buy much, and sometimes they just take up lots of your bandwidth without much profit or satisfaction to show for it. Unless you can develop them into better customers, they have got to go!

Exercise: First Class Customers



What makes a great customer great? Really think about it. Instead of running around serving anyone, what if you focused only on attracting the right kind of customers? In addition to sales and profitability, what are other qualities of really great customers? Are they great to work with? Do they pay on time? Do they love what you do so much that they advocate your brand?

Below, set the criteria for your First-Class Customers, i.e. those “super-customers” that power your growth and profitability. They are the heart of your Power Base.



EXAMPLE CRITERIA

- Revenue (existing + potential)
- Profitability
- Payment Time
- Customer Lifetime Value
- Values
- Culture
- Respect
- Connection
- Relationship
- Brand Fit
- Time and Effort
- Social Value
- Communication
- Demands
- Skills & Capabilities
- Attitude
- Expectations
- Background
- Location
- Financial Situation
- References
- Other?

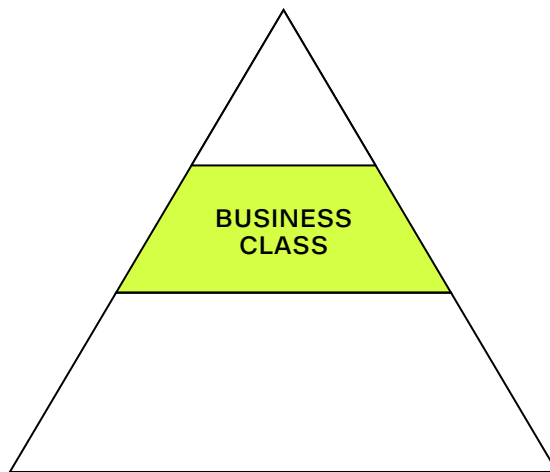
What are the criteria for First Class Customers?

Why is this group important for the business?

Exercise: Business Class Customers



What makes a good customer? It is unlikely that all your customers will be First Class, and including Business Class Customers is usually a good idea. First of all, they bring in revenue and profits, and often you can engage them to become even better customers. What are your criteria for Business Class Customers?



EXAMPLE CRITERIA

- Revenue (existing + potential)
- Profitability
- Payment Time
- Customer Lifetime Value
- Values
- Culture
- Respect
- Connection
- Relationship
- Brand Fit
- Time and Effort
- Social Value
- Communication
- Demands
- Skills & Capabilities
- Attitude
- Expectations
- Background
- Location
- Financial Situation
- References
- Other?

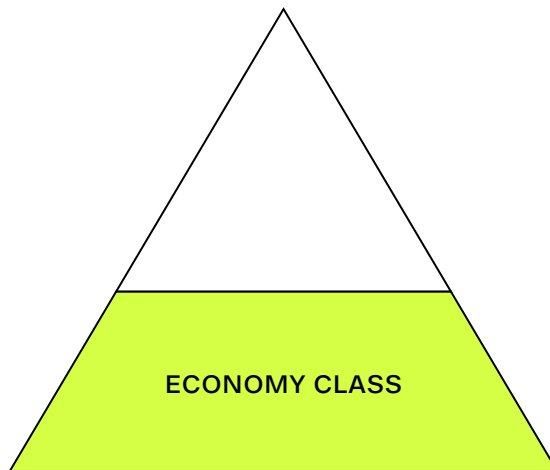
What are the criteria for Business Class Customers?

Why is this group important for the business?

Exercise: Economy Class Customers



In this model, Economy Class Customers represent those customers that provide significantly lower sales and profits. In fact, many of these are unprofitable and require a disproportional amount of attention, resources, and energy, which can cause you to lose focus. Typically, these customers are the least loyal, and the most price conscious. Therefore, unless you can nurture and grow them into Business Class or First Class, you should stop serving them. This group might represent 80% of your customers. Getting rid of them might sound really painful, and it can be, but it is likely to be the best thing you have ever done for your business, allowing you to give all your focus, energy and attention to those customers that matter most. Go for it!



EXAMPLE CRITERIA

- Low sales
- Poor profitability
- Profitability
- Long payment times
- One-off sales
- Expensive to acquire
- Low commitment
- Bad attitude
- Values misalignment
- Geographical location
- Poor relationships
- Poor brand fit
- Takes too much time
- Requires education
- Lack money
- Wrong background
- Wrong skills
- Nasty people
- Other?

**Which customers will we no longer serve?
(Economy Class)**

Why is this important for the business?

Actions to take



Action

By when

Done

1

2

3

4

5

6

7

8

9

10

To win over the right customer, you have to understand more about them than anyone else!

The Ideal Customer

With a truly customer-centric perspective, with a minimum viable market in mind, and with an idea of which customers within that market will make your best customers, it is time to get granular and focus on the one single individual that best represents your best potential customer, your Ideal Customer.

THE IDEAL CUSTOMER GIVES YOU FOCUS

The idea of The Ideal Customer is a really powerful concept that will help you become crystal clear about who you are in business for. Once you properly define your Ideal Customer and create your Customer Blueprint, you will know exactly which decisions are right for you, and which are not.

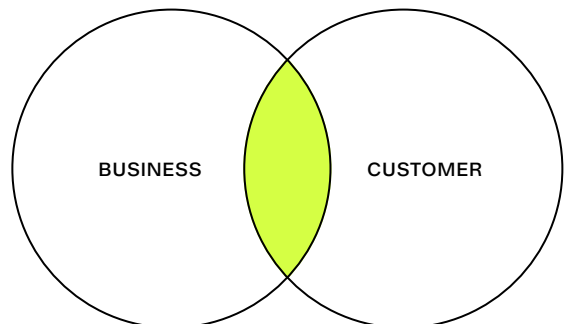
The Ideal Customer is a fictional (or real) description of one customer that best represents the characteristics, demographics and psychographics of your target group. To put it in simpler terms, the Ideal Customer describes to you Who your best potential customer is (identity), What they want (outcomes), How they want it (experience), and Why they want it (deeper, emotional drivers).

You can have several Ideal Customers, but only if you are serving several segments and needs. The point is to define the Ideal Customer with as much rich detail as possible, so you have crystal-clear clarity on where you should be focusing your efforts.

HOW TO DEFINE YOUR IDEAL CUSTOMER

To define your Ideal Customer, start by thinking about a problem that you can solve better or differently than anyone else. Then ask yourself who has that problem. There might be many types of people who have the same problem, but not all of them want it solved in the same way. For example, while many people want to be fit, not everyone wants to punish themselves

by participating in 60-minute spinning classes, for example. You might want to serve the same customer problem (need), however, maybe you are uniquely skilled and positioned to provide a new form of exercise that creates the same results but without the torture on the back of the bike.



So in other words, discovering your Ideal Customer is like a matching game: you have to know both who they are and what they want, thus your unique skills and market opportunity, you have to know your strengths to define your Ideal Customer.

Your Ideal Customer exists at the intersection of “what they want”, “what you want”, and your unique ability to give it to them. You will define your Ideal Customer in the section called Customer Blueprint.

The Customer Blueprint

Once you have defined who your Ideal Customer is, it is time to gain some more insights to help you create and deliver exactly what these people want. This is one of the most central ideas that make brands loved by people; making people feel like what you offer is made exactly to meet their needs, and even to exceed them. For this, you need a Customer Blueprint, a document to store all that understanding that only you have. Use it for all your innovation and marketing purposes.

In the exercises that follow, you will define your Ideal Customer and map their wants and needs. But whereas most companies have only surface-level insights about their customers, you will dig deeper into their psychology, uncovering several different types of customer needs (wants, desires, dreams, aspirations, etc.) This will give you the ultimate edge over the competition, as understanding more about your customers than anyone else is the starting point for providing exceptional value.

To recap, the holy grail of brand-building is to be considered the only viable choice by as many customers as possible. People who think of your brand as their best choice are likely going to buy more at higher prices and come back for more. And additionally, they will promote you to their friends and peers.

The best way to do this is to do something for these customers that no one else does, to provide some form of value that these customers want.

Therefore, the starting point is to understand what value is in the first place, then understand its different forms. First, value is simply anything that a person finds important, useful or meaningful. Value can be something functional, like feeding yourself when you are hungry, or it could be something emotional, like feeling safe. Value can also be symbolic, something that provides meaning to you. For example, watch brands have strong symbolic value as they project the brand's image on the user, thereby expressing to both the user and others something about that person. In brief, our choices reflect who we are, they help us build our identities and express them to people around us. This is true whether you use brands in the first place, or whether you don't. We're always projecting an image of who we are through the choices we make. And these choices reflect who we are, whether we admit it to ourselves or not.

The Customer Blueprint

Before we get you started on digging into the psyche of your Ideal Customer, let's first get you familiar with the four different levels of value.

THE FOUR DIFFERENT LEVELS OF VALUE.

As human beings, we buy things to be better off. We buy progress. However, we often want more than the end result, and as already established, value is multi-faceted. We don't just want to be better off, we also care about the process, what things mean and how it all makes us feel. Let's take a closer look.

For example, let's imagine that you wanted to buy a gym membership. If we were to break down the factors that would affect your purchase decisions and the experience itself, we could identify four different types of motivating factors, i.e. four sources of value. By gaining understanding of all of these levels, you will be on your way to understanding your customer better than your competition.

THE WHO - IDENTITY

The number one criteria for brand success is relevance. When we encounter different brands, our brains are automatically asking the question "Is this for me?". This is how we are able to navigate all the clutter and pick what is right for us. We just ignore what is not relevant. For this reason, you have to understand the identity of your customer, i.e. who they are and what

they are like. With brands, like attracts like. So you would probably want to choose a gym that reflects who you are, and where there are similar people to you.

THE WHAT - AIM

Whenever we buy something, we have an aim, a desired outcome in mind. We always buy to be better off, whether to move toward pleasure, or move away from pain. In the example of the gym membership, let's assume your aim is to look good. This is the main thing you want as a result you being a member of the gym. Innovation expert Clayton Christensen would likely call this your "job to be done".

THE HOW - EXPERIENCE

As human beings, we are always trying to move toward pleasure and to avoid and move away from pain. Therefore, experience matters. There might be many different ways to get to the same desired outcome (THE WHAT), and we need to understand how the Ideal Customer prefers to get to their outcome. The HOW space is where most of the innovation happens nowadays. Consider the rise of Netflix, for example. They started by improving the experience of renting and watching movies, not by changing the product or

the outcome itself.

In our example, you could probably think of dozens of things that matter to you when it comes to the experience of going to the gym. If you were to think through the process of getting to the gym, working out and returning home, many of the factors might affect your decision. For example, location, cleanliness of the facilities, access to classes, aesthetics, music, and ambiance, etc.

THE WHY - PURPOSE

Behind most of the things we want in life, there is a deeper purpose. By understanding these deeper motivating factors, you will be able to connect on a deeper level with your customer. You might know WHAT your customers want (e.g., to look good), but do you know WHY? The WHY is made of emotional reasons, often related to deeply held beliefs, values, and attitudes.

Let's assume you want to look good because you want to find a great life partner. Now think of how this insight might change how a gym would innovate its offering and communicate with you? They might connect with you on a deeper level and provide opportunities to meet that dream partner.

Exercise: The Customer Blueprint



Now it is time for you to start working on your Customer Blueprint, your “north star” for all decisions related to your brand and business going forward. The recommended thing to do here is to reach out to real people who meet your criteria for a potential Ideal Customer. However, you can start filling out the blueprint based on your intuition and experience too. Just make sure you validate and expand your blueprint with real-world insights, otherwise, this tool won’t deliver the game-changing results it will when done right.

HOW IT WORKS

The Customer Blueprint is the document where you will store the knowledge and insights that you have about your Ideal Customer. The blueprint combines insights related to the WHO (Identity), WHAT (Outcome), HOW (Experience), and WHY (Purpose). Together they form a powerful blueprint that will help you make informed decisions and shape your brand, enabling you to deliver exactly what your customers want.

As you start the process, begin by imagining your Ideal Customer, a fictional character that represents the most common characteristics of the people you want as your customers. Then, as you do real-world research (check the guide in this section), you will be filling in the blanks and replacing hunches with actual facts and insights.

Just to recap, the purpose of all of this is to help you empathize with your customers and be better in tune with who they are, what they want, how they want it, and why they want it. Think of your Customer Blueprint as the source of everything you do, from how you create value to how you talk and engage with your customers. Going through this exercise, and doing the actual research is a process of empathy and of humanizing your customer. Too often, companies are disconnected with the human side of their customers, treating them merely as “consumers,” or “buyers”.

By getting up close with your customers and spending time with them in their natural environments, you will be able to extract an incredible amount of useful insight. Just watching their behavior, their body language, how they talk, how they dress, where they spend time, with who, etc. will give you lots of non-verbal clues in addition to asking them questions.

Remember, make your Customer Blueprint a living document. Do not think of it as ever being complete. Keep adding and exchanging information as you discover more. And don’t limit the blueprint to a few pages, keep expanding it as you go. You could fill a whole journal or a “coffee table book” with insights, images, quotes and stories.

Also, make sure you visualize your blueprint. Use either real-world images (always ask for rights to use them), drawings, or prepare a mood board by using images you find online. Add as much detail as possible. Then use these to tell the story about your Ideal Customer. And don’t limit this to a “lookbook” of your customer, why not place your mood board in your office front and center, in your meeting rooms or wherever people need a constant reminder of who is the real boss of your business. Remember, your customer is who makes everything possible.

The Customer Blueprint: Who – the identity



Describe the identity of your Ideal Customer is below. Describe the Ideal Customer as a person with as much detail as possible. Keep in mind that the Ideal Customer represents a group of people with similar characteristics, personality traits, attitudes, beliefs, values and preferences. Fill in more insights as you learn more, from your research or from your ongoing customer interactions. Use the tool below to get started, or create your own expanded version of the blueprint.

NAME _____

GENDER _____

AGE _____

PROFESSION _____

INCOME _____

INTEREST _____

LOCATION _____

FAVOURITE BRANDS _____

PERSONALITY _____

WHERE AND HOW DO THEY LIVE? _____

DESCRIBE THEIR STYLE _____

DESCRIBE THEIR LIFESTYLE _____

WHAT DO THEY VALUE? _____

WHAT ARE THEIR KEY BELIEFS? _____

OTHER OBSERVATIONS AND INSIGHTS _____

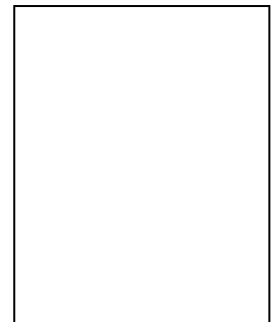


IMAGE / DRAWING

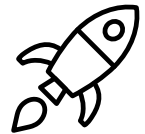
The Customer Blueprint: What – the aim



“The What” refers to the desired outcome, i.e., progress and change that people want as a result of buying, using, or owning a brand, product, or service. As you spend time researching people, try to extract what their 1-3 main aims are within the context, then rank them in order of importance. The Aim answers the question: “When it comes to (category or brand), what do you most want from it?”.

1

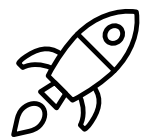
Aim...



Keep it short and simple. An aim is an end result, and it exists regardless of your brand exists. The aim has likely existed already 2000 years ago, so don't confuse the context or desired experience or features with the desired outcome (aim).

2

Aim...



Examples

“to be healthy and fit”

“to grow my business”

“to enjoy a relaxing holiday”

“to make my headache go away”

“to feel refreshed”

“to be financially free from worry”

3

Aim...

The Customer Blueprint: How – the experience

“The How” refers to the process, journey and experience that people go through as they progress toward their aim. For example, you might remember how Netflix rose to their current market position. They offered the same product as other movie rental companies, but they added a service that took away many pain points (e.g. returning the movies) and added lots of convenience and choice (digital application and access from your living room). The How space is where you are likely to find the most opportunities for differentiation, value creation, and differentiation.

HOW TO EXTRACT “THE HOW”

Please note, this tool is made to be simple, and you can add many more steps and observations by making your own version of it. If you conduct a few good interviews, you might discover dozens of important small things related to each area and step.s

As human beings, we are always trying to move away from pain and move toward pleasure (gain). As we strive to reach our aims, we go through specific steps, a process, or journey. This makes up the experience. The experience will include things we want and enjoy (things that bring pleasure), and some things we don't like (pain, discomfort, fear, anxiety, stress, or anything negative).

To extract this information, talk to your Ideal Customer (or if you don't have access now, empathize and imagine, then complete this later), about the experience, about what they go through to get to their aim. At this stage, you want to get an understanding of the Experience Areas (it could be called the Customer Journey, although not all experiences follow a linear journey).

Once you have mapped the overall Experience Areas (e.g. 3-4 main areas), dig into each of them and ask about what happens within those areas. What are the individual steps they go through? At this point, keep asking questions about the positive and the negative (pain and pleasure).

Try to understand what your Ideal Customer wants from each step of the journey and experience, and also and what they want to avoid. You can even ask them to give you a number to signify how strong their emotion is to help you identify the most critical parts of the experience.

These insights will be extremely valuable as you innovate and design your offering, and your

engagement and communication. Go all in on this! It will be worth it.

To do this stage well, first, try to get an understanding of the process that people go through to reach their aim. Map the main areas of the journey and experience .

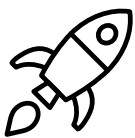
Second, ask questions and observe them to identify what people want (gains) and what they don't want (pains) from their experience. And thirdly, see if you can get people to rate how important the pains and gains are to people. You can use a scale from 1-5 to get a good read on where your best opportunities lie.

Feel free to expand this beyond the simple tool included on the next page. You can often discover tens of pains and gains per Experience Area (customer journey).

EXAMPLE: CAR RENTAL EXPERIENCE

Let's assume you are going on a holiday, and you want to rent a car during your stay in a foreign country. What would be the main parts of your experience? These are the Experience Areas. We could define them simply as “Exploring”, “Purchasing”, and “Using”.

To map your expectations (either based on previous experiences or simply your first-time expectation), a researcher would ask you to talk through the whole journey. The researcher would ask you to share stories and look for especially pleasurable or painful experiences or expectations. Check the example on the next page, then work on your own Customer Blueprint.



Ask questions such as:

“Tell me about what happens when...?”

“How does that make you feel...?”

“What would you want to happen...?”

“What don't you want to happen...?”

EXPERIENCE AREA

Purchasing

DESCRIPTION OF AREA

The searching, selection and picking up of the rental car.

WHAT HAPPENS?**PAINS (-) & GAINS (+)****SEARCHING FOR ALTERNATIVES**

(+) Wants an easy diy experience free from hassle

(+) Prefers to compare prices of all alternatives on one website

(-) Finds it confusing with too many options

(-) Feels worried about whether car is available

SELECTING AND PAYING

(+) Wants to make all choices before trip to avoid pains at pick-up

(+) Prefers to pay in multipla installments to avoid risk

(-) Finds it difficult to know which car you will actually get

(-) Feels shady as price changes with endless add-ons

(+) Wants a fast, hassle-free pick-up after long travel

PICKING UP THE CAR AT AIRPORT

(+) Wants a short distance to the vehicle due to luggage

(+) Is willing to pay extra for help with installing child seats

(-) Hates having to give same information at counter

(-) Hates when clerk tries to upsell them

(+) Wants a smooth, fast experience

ARRIVING AT CAR

(+) Wants help with directions to destination

(+) Appreciates help installing child seats and inserting luggage

(-) Has low tolreance of waiting at this stage of journey

EXPERIENCE AREA

DESCRIPTION OF AREA

WHAT HAPPENS?

PAINS (-) & GAINS (+)

EXPERIENCE AREA

DESCRIPTION OF AREA

WHAT HAPPENS?

PAINS (-) & GAINS (+)

EXPERIENCE AREA

DESCRIPTION OF AREA

WHAT HAPPENS?

PAINS (-) & GAINS (+)

EXPERIENCE AREA

DESCRIPTION OF AREA

WHAT HAPPENS?

PAINS (-) & GAINS (+)

EXPERIENCE AREA

DESCRIPTION OF AREA

WHAT HAPPENS?

PAINS (-) & GAINS (+)

The Customer Blueprint: Why – the purpose

“The Why” refers to the underlying motives that cause certain attitudes and behaviors. People usually have both “surface-level” desires (such as wanting to get in shape), as well deeper, emotional motives affecting why they do what they do (such as wanting to be in shape to find a new partner (the need to be loved). By uncovering these deeper motives (their why’s), you’ll be able to discover new ways to innovate, create value and communicate with your Ideal Customers. By connecting your brand offering and communications with their deepheld beliefs, values, attitudes and emotinal needs, you will be able differentiate your brand andn create value beyond your products and services.

EXAMPLES OF UNDERLYING WHY’S

The need to belong.
 The need to be loved.
 The need to be appreciated.
 The need to be respected.
 The need to feel significant.
 The need to contribute.
 The need to learn and grow.

HOW TO EXTRACT “THE WHY”

The simplest way to get to this level is simply by asking people “Why” questions. When you ask several “Why” questions in a row, you will dig deeper and come closer to the real reason people behave the way they do. But make sure you are respectful of people, you don’t want to intrude, so be sensitive.

Asking people for their “Why’s”, i.e. why they want what they want, might or might not work, depending on the context and topic of your research. For example, people are not typically good at admitting their weaknesses, or to talk about their insecurities or vanities. And in some cases, these motives are so deeply embedded in the subconscious that people either don’t know what to answer, or they will give you an answer that makes rational sense to them, even though it might be false.

To make sure you get to the truth, use both interviewing techniques and observation. Look for facial exprerssions and body language to give you clues, and observe to see if their behavior is congruent with their talk. This might be the closest you will ever come to being a private detective, and just like a good detective (at least those we see on TV), don’t take anything at face value. Dig deeper and question.

This level presents the highest forms of value you can create for people. If you can help people by getting them closer to their deepest human needs, such as belonging, feel appreciated, connecting with other human beings, transforming them into better human beings, well, then there is nothing stopping you.

When you can meet people’s deeper emotional needs, you have discovered the gold. Interestingly, people are willing to pay the most for the least tangible things, i.e. emotions and meaning.

The Customer Blueprint: Why – the purpose



After you have done your research, fill in your answers below. Focus on uncovering the deeper emotional motives behind the aims of your Ideal Customer, then document the top 3 motives, followed by a short motivation or story.

1

Purpose:

Notes:

2

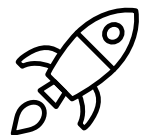
Purpose:

Notes:

3

Purpose:

Notes:



Keep it short and simple. When you ask “Why” several times, you will usually find a simple truth. Make sure you record a short story or explanation below, so you and others can appreciate the context.

Actions to take



Action

By when

Done

1

2

3

4

5

6

7

8

9

10

***Your Customer
Blueprint should be
so well done that you
consider it one of the
most valuable assets
of your business.***

Research guide

The process

Here follows a short research guide to help you extract crucial insights from your Ideal Customers. These methods are rooted in qualitative research, i.e., you will primarily use in-depth interviews and observation techniques to uncover insights. These methods are rooted in design research, which is a set of methods aimed at inspiring the creation process, not validating a whole market. If you want to, you can always validate your finding against larger populations using quantitative market research methods. To learn more, go online and search for “design research.”

Overview

In the Customer Blueprint, we covered some of the things you will learn here, however, this is your lean step-by-step guide to get you going with little or no experience as a practitioner of user-centric customer research. Use this guide to get going, and remember, rather than trying to get it perfect the first time, make sure you find a few potential Ideal Customers (approx. 5 will be fine for now) and spend time with them.

Step 1. Recruit the right people

The first step is to reach out to existing or potential customers. You can use the instructions from Module 1 for further assistance. Seek to find people who represent your idea of the Ideal Customer. Include people who are opinionated, biased and even provocative. Remember, you want to get unique perspectives and insights to inspire your discovery process.

Step 2. Plan the research

There are lots of different techniques for increasing your understanding, empathizing and gathering learnings. In this program, we will focus on two essential techniques; Interviewing and Observation. Both of these techniques can be used at the same time, although you want to reserve time for both also separately.

Make sure you contact people well in advance to give them time, and also make sure you get their permission. It is always a good idea to provide some sort of reward for their time, this could be a gift, a gift card or anything else you think is appropriate. In addition to considering WHO to interview and observe, also consider the context by choosing WHERE and WHEN you will get the learnings you are looking for.

Step 3. Conduct the research

What you will need to capture information:

- Your interview guide (questions and plan)
 - Pen and paper
 - A recorder (can be your smart phone)
 - A camera (can be your smart phone)
 - A video recorder (can be your smart phone)
 - (Check the interview guide)
-

Step 4. Synthesize and frame

The final stage in the research process is to take all of your findings and translate them into actionable insights and opportunities.

An actionable insight is an insight that leads to something you can take action on. Some of your insights will lead to actions you can take immediately, and others will present new opportunities, and at best breakthroughs for your brand and business. A customer insight is an understanding, a revelation about customer behavior that leads to a commercial action or opportunity.

You uncover customer insights through a three-step process; First, you structure your findings from your research to be able to explore it. Second, you synthesize findings to look for connections and meaning, which lead to insights. Third, you capture your insights and frame them into opportunities.

Interview Guide – who

For your contextual interviews (field interviews), you will only need a few great questions per research area (WHO, WHAT, HOW and WHY). Stick with these and you will be fine, but also go with the flow, i.e. keep it organic and natural, if your subject goes deep into one area, follow them there and give them space, then direct them back into the other areas.

Asking “who” questions

WHO questions are intended to give you an idea of the identity and personality of the person you are interviewing. Also seek to capture facts concerning their life, from where they live, how they live, what they do etc.

WHO QUESTIONS:

1. Tell me about yourself.

This section is about capturing their Identity, as well as facts about who they are, what they do, what they like, and what they are like).

a) Fact questions

- what is your background?
(profession, occupation, family, etc.)
- where do you live
- what do you do
- what is your story?

b) Values & Personality

- why did you choose your
(profession, hobby, etc.)
- how would you describe yourself?
- how do you think your friends would describe yourself?
- what things are important to you in your life?
(profession, hobby etc.)

c) Add your own questions

- look for their characteristics, traits, beliefs, attitudes and values, style, taste etc.

15 tips for successful research

- Immerse yourself in their world
- Don't judge, only seek to understand.
- Always look for fresh, unique perspectives.
- Capture non-verbal cues, not just what they say.
- Challenger your own assumptions, be open.
- Keep digging for the “why” behind everything.
- Ask open-ended questions.
- Don't lead the subject through your questions.
- Constantly seek to map their pains and gain.
- Focus on what they do, not just what they say.
- Ask them to elaborate and share stories.
- Be fully engaged, present and friendly.
- Make them feel safe and accepted.
- Take notes, record and film as much as you can.
- Unpack your findings immediately afterwards.

Interview Guide – what

Here is your guide for asking questions about the aims (desired outcomes) of your interview subjects. You can make up many more questions on your own, however, this one simple question has been proven to work everytime. You might need to help people understand the question.

Asking “what” questions

WHAT questions are intended to give you clarity on what aim people are seeking as they choose a particular product, service and brand. The aim always refers to an outcome, a result, an effect. Don't confuse HOW people like things with what they want to achieve, i.e. their aim.

Seek to capture the most important aim. You can capture several aims, but you will need clarity on the top 3 aims (and make sure you understand the most important one).

When it comes to *(insert category)*, what is it that you most want from it?

A category could be "diapers", "coffee", "accounting firms", "gyms", "car rentals" etc.

If people don't understand, keep re-framing the question until they understand what you are looking for, i.e. their aim (result, outcome, goal). Answers could be, e.g. "to feel energized", "to get fit", "to avoid doing the bookkeeping". There are no right or wrong answers. This is really the one question you need for this.

You can also use the opportunity to ask them about which brands currently do a good job in helping them get to their aim.

Ask: When it comes to *(the aim they mentioned)* which brand (company, product, service) does the best job helping you achieve your aim, in your opinion? (why?, how?)

You could also ask them whether there is an “only choice brand” in the context of the question.

Interview guide – how

Here is your guide for asking questions about the experience (the process and journey people go through to get to their aim) of your interview subjects. You can make up many more questions on your own, however, this simple format has worked over and over again.

Asking “how” questions

“How” questions are intended to give you insight into the expectations people have regarding the experience of reaching their aims. As we have established, you can get to the same destination in many different ways, some of which will be more pleasing than others. If you had to travel a long distance, flying would make most people happier than driving or walking, for example.

People are very particular in terms of what they want from an experience, so listen and observe carefully for clues.

To extract the “How”, your interview should be designed to gain the following understanding:

- What are the key areas of the experience?
- What are the steps people go through related to the areas? What do they want to experience vs. what don't they want to experience along the way? (Pains & Gains)
- (optional) Which are the most important factors?

Map the experience (journey)

Q: When it comes to (*aim*), which are the steps you would go through to achieve it?

This question helps you map the journey. You might have to help the subject by giving an example. To keep it simple, you could split their journey into three part; Before (exploration, selection, etc.) During (purchase, usage, etc.) and After (storage, owning, service, return, disposal, etc. Name the Experience Areas (categories) as you best see fit.

DISCOVER PAINS AND GAINS

Questions:

- When it comes to (*category they mentioned*) what are things that are really important (valuable) to you?
- What kind of an experience are you looking for?
- What do you want from the experience? (gains)
- What don't you want from the experience? (pains)
- Can you share an experience to illustrate what you mean?

It is pretty simple. Just ask them to walk through their journey once you have mapped it (e.g., into three core areas. Keep asking them to talk about their expectations, what they want, what they don't want, and remember to ask them to motivate their answers. Then, if you want to, get more advanced and ask them to rate how important the things they mention are, e.g., from a scale from 1-5.

Interview guide – how

People usually have a more in-depth, underlying motive that explains why they want what they want. These deeper, often emotional needs are usually those, that if you can satisfy them, people are willing to pay a much higher price than for “surface-level” needs. Here are some simple advice for uncovering the beliefs, values, attitudes, and emotions that drive human behavior.

Asking “why” questions

“Why” questions are intended to give you a deeper understanding of the underlying motivators that affect the behaviors of people. There are values, beliefs, and attitudes.

For example, you might ask someone to describe why they go to the gym. They might answer you “to be healthy and fit”. But this does not give you anything you could not arrive at yourself. So you keep asking WHY in many different ways to get people to open up. For example:

- “What does it mean to be healthy and fit for you?”
- “Why is that important to you?”

Someone might tell you they did not like the feeling of being overweight. Then you ask them why they did not like it, and so forth. Repeat this enough times and you will start uncovering a deeper understanding and insight, something you can use to generate fresh insights and new opportunities for value creation and differentiation.

Use the WHY questions together with the WHAT and the HOW questions to get the best results. This way you will keep it contextual.

Ask them, then observe them.

1. Why is *(something they said)* important to you?

This question helps reveal values. Ask WHY many times to go deeper and deeper. Sometimes do this up to six times to get to a profound truth.

2. What do you believe to be true about *(something they said)*

This question prompts people to share their beliefs, which are the truths (the laws) by which people operate.

3. How would you react if *(something happened)*?

This question reveals attitudes, values, and beliefs.

Research guide

Synthesis and framing

Once you have done your research, it is time to take all your findings (your notes, recordings, images, videos, etc.) and start the process of synthesis (sense-making) to gain insights, and then frame them into opportunities.

Overview

Synthesis and framing are crucial to gaining insights and to feed your brand and business with fresh perspectives, ideas and opportunities for innovation and marketing. Take this steps to get this right.

The first thing you want to do as you come back from your field research is to “unpack” everything. This means, get everything out, from the camera, from your notebook, from your head, and wherever the information may exist. Do this as quickly as possible, as long as you have a feel for what you experienced. You might also want to “dump” your own feelings and thoughts from the research because there might be many cues you picked up on, which you did not write down or capture.

The best way I know is to place all your findings on a wall. This will help you greatly, as you will be able to better structure your findings, as well as groups findings into a clear structure.

For example, you would structure your findings according to the WHO, WHAT, HOW and WHY, or according to the customer journey, or whatever makes the most sense to you. You might have some overlapping information, and you can label the information in a way that makes it easy to work with it.

When you have structured the information neatly on a wall, you are ready to start interpreting it, which is Step 2: Synthesizing.

2. Synthesizing for insights

To synthesize is basically the opposite of analyzing. Synthesizing means looking for patterns, for connections that lead you to “a-ha” moments, a.k.a. insights.

This is why having all your information on the wall is crucial. It allows you to take different parts of your findings and try to connect them in order to interpret what is going on.

Remember, synthesizing involves your own interpretation, it is NOT just information, it is information + interpretation = meaning.

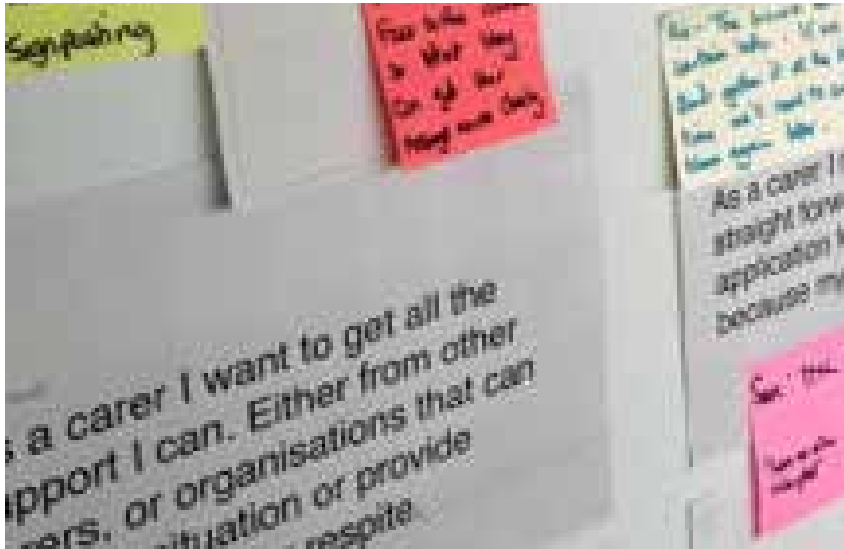
Use this simple process to help you synthesize; First, ask yourself: “What is going on?” Pick something that catches your eye, a quote, a picture, something you observed or learned. Treat this information as fact. If they said it, it’s their truth. Don’t tamper with the info at this level.

Then, ask “Why is this happening?” This is your intuitive interpretation. Don’t try to be perfect, just use your gut and provide an explanation (there can be many interpretations).

Finally, ask “What does this mean?” When you answer this question (using your intuition), you should be able to arrive at insights. This will not always be easy, but try writing down several interpretations. Something will feel right, or interesting. Pick that one, and then move on, exploring for more insights.

3. Framing for opportunities

The final step in the Research process is to translate insights into opportunities. This means interpreting what the insight means for your brand and business. All insights might not lead to great new opportunities, although they might lead to some actions you can take.



However, the greatest insights often lead to game-changing breakthroughs and transformations. They can completely change how you will build your brand and business in the future. So don't treat this lightly. While this might be the most difficult stage in the whole process (the insights and opportunity part), it can have the most profound effect. So stick with it, don't come up with one or two interpretations, really go all-in and search for that breakthrough insight and you will discover it.

The only thing you need to do is to use your intuition to think about what kind of opportunity that your insights might present you with, then write them down in the form of a "How might we..." question.

You can write down several framings from one insight, and this way you will have many "departure points" as you start creating ideas for how to turn your opportunities into a something exceptional and valuable.

Try changing one word in your framing, and you will realize it can create completely new directions and new ideas. For example compare "communicate" vs. "empower" etc.

How might we...

For example, in the earlier example we said that while the aim of many people looking for a gym membership is "to look good", we also concluded that behind that aim there might be a "Why" that gives us fuel for differentiation, innovation and marketing. In our earlier example, a possible "Why" could be "to find a partner", which is connected to deep human need for connection and love.

We could use this to frame a few opportunities. As you will notice, how you use the words is critical, and one word can open up whole new avenues of opportunity.

FRAMING 1: "HOW MIGHT WE DESIGN A GYM TO CATER TO SINGLE PEOPLE LOOKING TO FIND NEW PARTNERS?"

In this example, the framing suggests the gym would become a "gym for singles", possibly with lots of match-making opportunities made available.

FRAMING 2: "HOW MIGHT WE BUILD A STRONGER COMMUNITY AND CONNECTION AMONG OUR MEMBERS?"

This framing is less radical, in terms of the direction it suggests. However, it all depends on the ideas which you implement following the insights and the opportunities you identify.

Make sure you capture both insights and opportunities. One insight can lead to many opportunities, as you have just seen.

USE THE TOOLS ON THE FOLLOWING PAGES TO CAPTURE YOUR FINDINGS.



Insights card

Project

FACT: WHAT IS HAPPENING?

Write down an interesting fact, observation, quote, event, behavior etc.

INSIGHT: WHY IS THIS HAPPENING?

Make sense of what happened and why it happened based on your gut instinct. Look for a surprising truth or revelation, not something too obvious and exploited.

OPPORTUNITY: WHAT DOES THIS MEAN FOR US?

Translate the insight into one or several potential opportunities for your brand and business. Try different framings, using different words to trigger different directions.

Actions to take



Action

By when

Done

1

2

3

4

5

6

7

8

9

10

Strategy



Module overview

Welcome to the module on Strategy. By now you should have adopted a brand philosophy (mindset, knowledge and worldview) that will guide your every decision. You should also have defined your market (preferably your smallest viable market), and you should have defined your Ideal Customer and completed your Customer Blueprint in order to gain insights that will allow you to give people exactly what they want, while becoming unique in the marketplace.

Your brand strategy is absolutely crucial to building a brand that will change the game for you. It is where you define all those things that you will execute against. And remember, your brand is the customer-facing aspect of your business, so designing your brand strategy should not happen without it affecting your business strategy. The two are just two sides of the same coin. Now it's time to design your brand platform to give you inspiration and clarity going forward. Do this well and there's nothing stopping.

In this module, you will:

1. Put your brand philosophy and principles into practice.
2. Define your purpose, customer vision, brand identity, onliness, promise and brand story.

Here is your brand strategy workbook. Check the briefing videos and go through the steps and the assignments in the order they are presented here, to make it as easy as possible for you.

Some of the exercises might feel a bit difficult at first, but stick with it. Bring your best creativity and energy into this, because this is where you get to re-imagine your brand and your business, to re-think how you will matter in the lives of your customers, and how you will change the game. Now, what is more exciting than that!

Good luck, I am rooting for you!

Tobias

Your brand strategy is the customer-facing part of your business strategy.

Your brand strategy should help you answer the question “Why should they choose us?”.

Who are they? (customer)

What are their other choices? (competition)

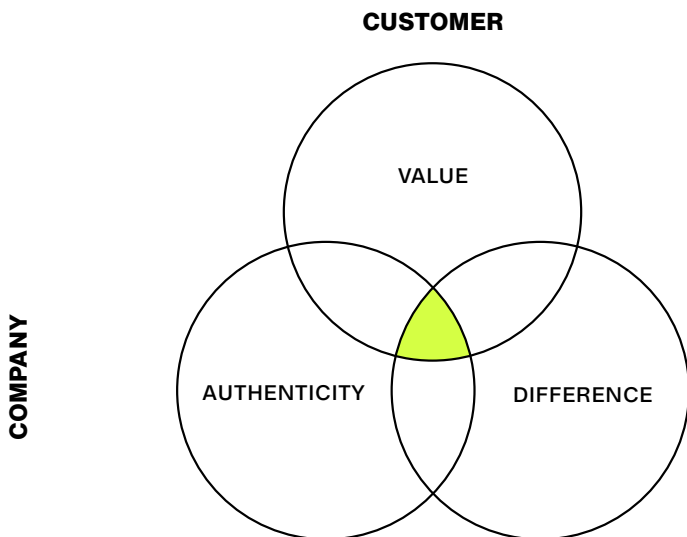
Who are we? (brand identity)

Why us? (what do we do that no one else does?)



Exercise: Exploration

In the Customer module, we focused primarily on defining and understanding your Ideal Customer. We also briefly covered your market and your place in it. Before we define your brand, let's first spend some time thinking about the context of your brand and business. To do this, let's consider three perspectives. This exercise will help you get an understanding of where your uniqueness and potential lies.



The sweet spot of opportunity

In the Customer Module, you already were already familiarized with this model. Now it's time to use it again, this time to look at all three perspectives.

I suggest you draw this same Venn diagram on a whiteboard, or print it out and put it on a wall where you can work visually. Assemble as much relevant information as you can in all three areas, then sit back and synthesize.

Take at least 30 minutes to reflect on the reality from each perspective. Write down your findings and place them on a wall. Then think about where your greatest opportunity lies, given the three perspectives.

COMPANY:

- What is our greatest potential?
- what are we really good at?
- what can we potentially be “the only” at?
- what are we known for?
- where is our credibility?
- what unrealized potential do we have?

CUSTOMER:

- Who are our most important (potential) customers?
- What do they value?
(Use your Customer Blueprint here)

MARKET:

- Where is our most potential space in the marketplace?
- What are the factors that will most affect the future?
- what are the trends?
- what are other factors (political, competition, new entrants etc.)

Purpose

Your purpose is essentially about “why you exist, beyond making money”. It is your overarching WHY, the motivational force behind your brand. If your company and your brand is the same, you only need one purpose. However, if you are managing multiple brands, you can craft a brand purpose for all of them. In a world where customer choose brands increasingly for what they stand for (their purpose and values) over features and attributes (megabytes, looks, convenience etc.), your purpose is “the heart” of your brand.

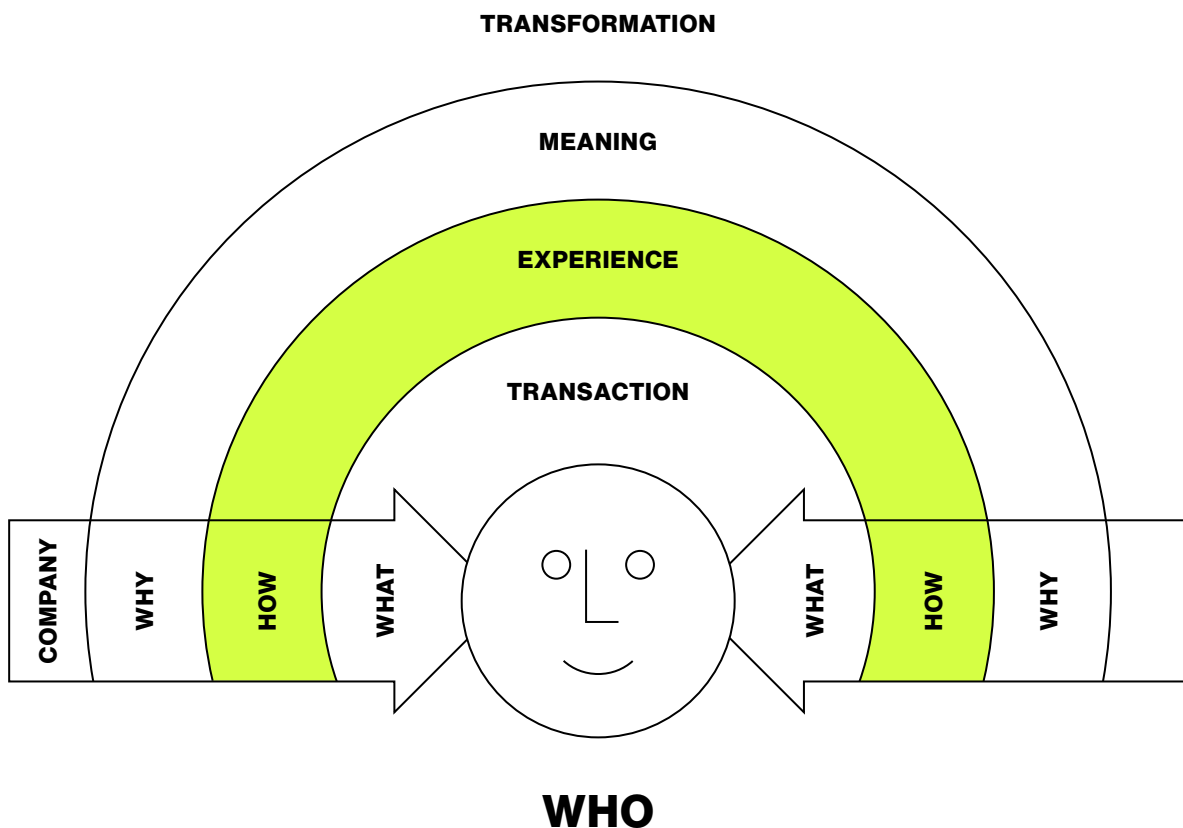
Your purpose is the heart of your brand

A great purpose statement guides, inspires, and rallies you and your employees toward something more valuable than money. Customers. At best, it connects the “Why” of your customers with the “Why” of your

company, creating value and meaning beyond your products and services.

As you explore to define your brand’s purpose, make sure you don’t think too small or modest. People get inspired

by a big purpose, so try to define a purpose that is grand enough to inspire and set new standards for your brand and business, and everyone who is involved with it.



In a study we did together with The University of Delft recently, we found that when people think of your brand as their “only choice”, they are on average willing to pay 69% more for it, compared to the second choice. We also learned that the Only Choice brand becomes that way because they create value on many different levels. They not only help people get to their aims (The What), they do it better than other brands (The How), and they provide higher forms of meaning (The Why). The greatest brands help people transform into better versions of themselves.

Exercise: The Purpose Duel



Here's a simple exercise to help you get your mind going. It is great because it forces you to think beyond your day-to-day business and propels you into those big questions and ideas that lie behind it all. This exercise is great when you have a partner to do this with, but you can also do this by yourself, using a pen and a paper.

How Airbnb discovered their purpose

Ask these two questions several times

We believe in a world where people belong, anywhere.

Chip Conley, one of the driving forces behind Airbnb, was the one who taught us this exercise on our podcast. He used this with the leadership team at Airbnb to discover what they were all about. Using this exercise (slightly modified), they arrived at the legendary mantra "Belong Anywhere".

It helped them completely re-think the business they were in, and it helped them define their purpose.

1. What business are we in?
2. Why does it matter?

Ask your partner (or yourself) to answer two questions. As the other person (or you) has answered both questions, now you have to come up with a different answer to both questions. You cannot answer the same way. Keep doing this until you arrive at something interesting. Do it at least 5 times, and you should come close to discovering your purpose.

Brand purpose

Here are some examples for you to review and reflect on as you write your own purpose statement.

To make banking trustworthy again.

To stop entrepreneurial suffering.

To connect people.

To help bring creative projects to life.

To help teams work together effectively.

To refresh the world.

To heal people.

To save people money so they can live better.

To make people happy.

To prevent human suffering.

To bring inspiration and joy to every athlete in the world.

Customer Vision

Your Customer Vision is simply your vision for how you want to make a difference in the lives of your customers. Think of this simply as the vision of your company or brand from the perspective of your Ideal Customer.

GET STARTED WITH THESE QUESTIONS

- What is the change and the progress you want to make possible for your customers?
- What results do you want to create for your customers?
- What do you want to make possible for them?
- What pains do you want to rid them of?
- How do you want to make your customers better?
- What do you want to enable for them?
- What do you want them to have?
- What do you want to help them become?
- How will you transform them?

Remember, your customers don't buy your products and services, they buy the change and the progress they enable. Therefore, make your Customer Vision aspirational, then do everything you can to make it true.

These questions will help you ask questions that go beyond the features and direct benefits of your products and services. It will force you to think on a higher level. Remember, the game is played on the level of what you stand for and what you do for your customers that no one else does. So really expand your thinking here.

CASE VOLVO

Our vision is that by 2020 no one should be killed or seriously injured in a new Volvo car.

“At Volvo Cars, we don't accept that globally 1.3 million people should die every year in road traffic accidents. Vision 2020 is our way of creating more sustainable personal transport. It's a key element in our sustainability framework, which outlines how our company protects people and the world around us, both now and in the future.”

www.volvocars.com

Check their video about their 2020 vision
<https://vimeo.com/158225419>



Examples: Customer Vision

Here are some examples for you to review and reflect on as you write your own customer vision.

Kitchen tool brand

To bring out the maker in you.

We want to help people tap into their imagination and sense of play, turning an everyday chore into a creative discovery.

Marketing agency

No more dry funnels.

We want to remove the fear and anxiety that comes from running an agency with big overheads while not knowing where next month's salaries will come from.

Genetic testing brand

To enable progress by removing the fear of the unknown.

People with potential hereditary diseases live with constant worry and fear. By bringing clarity to people, we help them progress in their life and improve the quality of their lives.

Fitness chain

To make it possible for even the busiest to be fit.

Most people blame lack of time as the number one reason for not being healthy and fit. Our job is to remove that excuse by offering short workouts wherever clients want them.

Baby food brand

To give mothers piece of mind and time to themselves.

Preparing healthy baby food can be overwhelming. We provide only the healthiest ready-made baby foods, giving mothers the freedom to use their time elsewhere.

Your brand

What is a big, desirable result you could deliver?

On the next page, write down your Customer Vision. Make it inspiring, aspirational, and simple.

Exercise: Customer Vision



Here are some examples for you to review and reflect on as you write your own customer vision.

Customer vision:

Explain vision:

***Does your customer
vision excite your
customers?
If not, start over.***

Brand identity

Your brand identity is essentially the qualities, characteristics and attributes that can be attached to your brand. They are the values, personality, voice and style of your company, product or service. Or, if you are the brand yourself, then your brand identity is likely identical to your own identity. In brand strategy, brand identity is aspirational, i.e., it is defined as how you would like to be perceived, not necessarily how you are perceived right now. Your brand identity leads to decisions about how you look, how you talk and behave, and what choices you make. It is essentially what creates the the image people have of you. The brand identity serves to define your desired future brand image. In the exercises that follow, we will focus on Brand Values and Brand Personality – the two cornerstones of Brand Identity.

Who are you?

A simple way to understand brand identity is to think about the identity of a person. Why not start with yourself. What are you really like? Not just on the surface, but deep inside?

In psychology identity can be defined as “the qualities, beliefs, personality, looks, and expressions that make a person”. In other words, identity is about both the internal, deep-help values, beliefs, and qualities, as well as the external aspects, such as looks.

In essence, your brand identity is made of the values and the characteristics that describe the “soul” of the brand. If your brand was a person (which it might be), how would you describe that person?

When you have defined the values, qualities, and personality, then you are ready to design your brand’s expressions (style, looks, tone-of-voice etc.).



The Virgin logo, featuring the word "Virgin" in a stylized, red, cursive font.

LIKE ATTRACTS LIKE

With brands, like attracts like. People who buy into the identity of Richard Branson (his values, personality and style) are likely to buy into his brand, Virgin.

Designing your identity

When you design your brand identity, start by reflecting on how you want your ideal customers to think and feel about you. What are the words you would like them to use when they describe your brand? Remember, it is very difficult (and expensive) to get people to know much about you, so keep it simple and choose only a few values or personality traits, then think creatively how you could express those values and attributes in a compelling way that attracts people to your brand.

When you do the exercises, refer to the brand as if it was a person, regardless of whether it actually a company, product, service or anything else.

Ask yourself the following questions:

- Who are we?
- What do we believe in?
- What are our most important values? (keep it to 3-5)
- What are we like? (the characteristics that describe you)

Questions you will want to address later, as you design your visual expressions and communications include:

- How do we talk? (your tone-of-voice, e.g. relaxed, youthful, optimistic etc.)
- What is our style? (what is our look and style?)
- How do we behave? (how do our people behave as we interact with each other, customers etc.?)

Exercise: Brand values



What are the beliefs, principles, morals, ethics and standards that best describe your brand?

Reflect on the most important values and personality traits that best describe the brand you want to build. Keep it aspirational, however, keep it “within reach”. If you are currently known as “trustworthy” and “conservative”, you might now want to declare that your brand is “adventurous” and “bohemian” tomorrow. Words are powerful, so choose your words wisely. Before you make your final decision, take some time to “taste” each word. Imagine how each word would play out in the real world. How would you use it to inspire new products and services? How would you use it for content creation, marketing and communication?

Write down your three (max 5) most important brand values. Explain each value in a few sentences.

Brand value:

Brand value:

Brand value:

***The brand strategy
is not your brand.
It's the wannabe
version of your
brand.***

Onlyness

Onlyness refers to the part of your brand that makes you unique to your Ideal Customers. This is the most central idea of this whole program, i.e. choosing a specific customer group for whom you can become their only viable choice. When you are seen as the absolute best choice, you can charge higher prices, and customers are more loyal, buy more, and advocate you to their friends and peers. For this reason, defining your Onlyness is absolutely critical.

Remember, you don't have to be the only player in your category to be the only choice, but you have to do something for customers that no one else does. For example, you might provide the exact same product or service, but because of how you are able to make feel as they interact with you, certain customers only want to do business with you. Your Onlyness can be

functional (faster delivery), or purely emotional or symbolic. For example, Coca-Cola is not the only cola drink on the market, however, to a large amount of its fan base, it is their only choice.

In this section, you will find a simple (yet somewhat daunting) exercise to help you clarify your Onlyness. To complete this exercise, consult your Customer Blueprint and all the other brand strategy documents and your research. You might need to print out several sheets; often people need 10-20 attempts to get this right. Trust your instinct; you will know when you've got it. You can do it!

This great exercise was originally invented by Marty Neumeier. All you need to do (on the following page), is to complete the following sentence.

For (ideal customer), (brand name) is the only (brand category that (unique benefit)).

IDEAL CUSTOMER

Fill in a name that describes your Ideal Customer. The important thing is that you know what it means. For example, I might call my Ideal Customer for The Future Academy a "business maverick", and my Customer Blueprint explains exactly who this type of person is. I recommend you come up with a term that describes your Ideal Customer in only a couple of words.

BRAND NAME

Just fill in your brand name here.

BRAND CATEGORY

Your brand category is the "frame of reference" for your customer. It is the foundation of your positioning and your Onlyness. Unless people can categorize your brand, unless they can "put you in a box", there is nothing for them to compare you with, and consequently you will not

be seen as different or "the only choice". Framing provides the mental structure that shapes how people see the world. One of the best ways to be unique is to "re-frame" or create a new category. However, make sure your customers will understand this category.

The broader the brand category, the more focused your uniqueness within that category must be. And conversely, if you are the only one in your category, you can deliver a broader set of value.

UNIQUE BENEFIT

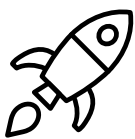
This is the unique value you deliver for your customers. There might be many more things that you do for clients than this part, however, here you only want to mention what makes you "the only". Remember that this is always relative to where you play, in other words, your Brand Category.

Exercise: Onlyness



Complete the exercise below. Follow the instructions on the previous page. You might need to think hard about this one. Often people will have to write down at least 10 versions before they settle on the final version. Remember, this is the one thing that will set you apart, that will make customers flock to you. Again, keep it simple. When you nail this one, you are one step closer to building a unique brand!

For _____ ,
_____ **is the only**
_____ **that**
_____ .



Remember that this exercise has two interrelated parts; the Brand Category and your Uniqueness. The broader the Brand Category, the more focused your Uniqueness needs to be, and vice versa. For example, if you wanted to be a unique “beer” (a broad descriptor of a global category, consisting of many sub-categories), you would need to be really focused to offer something that no one else offers. Conversely, if you defined your Brand Category more narrowly, e.g. “Nordic IPA”; you could provide a broader unique benefit.

Brand promise

Your brand promise is the articulation of the “top-level” value you deliver to your customers. Your brand promise is a commitment, a statement of what value customers can expect from you. You can think of it as the value proposition of your brand. It is an internal tool, not to be confused with a slogan. However, a good brand promise can be expressed as a slogan. For example, “Just Do It”, is Nike’s head slogan, and also a good expression of the top-level value that Nike delivers through its products, services and marketing; the attitude of a winner.

My advice is to think of your brand promise as a short, simple statement that works like an internal tagline. If it’s too long, no one will remember it. So make it short and sweet, then do everything you can to ensure that people understand it, feel it, get inspired by it, and know what to do with it. In the next module on the Brand Offering, you will specify exactly what your Brand Promise means, and in Module 6 you will specify and clarify how people internally should go about delivering on the promise.

Brand promise:

Explain:

Brand story

Your brand story is the glue that ties together your brand strategy, preferably in a human, emotional way. Stories help us human beings understand, empathize and derive meaning. Your job is to craft an inspiring, compelling story that will make people understand who you are, where you are coming from, and where you are going. Stories create magic.

WHY STORIES MATTER

The story you tell to customers is an essential part of how you establish the meaning of a brand. Stories are the vehicle of meaning. In fact, stories are how we attach meaning to anything in life.

Often, the company or brand that tells the best story wins — not the product or service with the best features.

Your brand story is the glue of your brand strategy. Stories create magic. It is how you put it all together in an emotional, memorable, and meaningful way.

Why? Because people do not buy your products or services. They buy what they do for them and how that makes them feel. People are willing to pay lots of money for feeling a certain way. Value is not what you store in your warehouse. Just like love, value is in the eye of the beholder.

Like Charles Revson, co-founder of Revlon, once said: *“In the factory we make cosmetics. In the drugstore we sell hope.”*

Your story is what separates your product and service from the rest; it's what gives it another dimension. It's the glue that binds your strategy, brand, and your business together. Great stories succeed because they capture the imagination of large or important audiences.

Great stories evoke our imagination. Like magic, they trigger the child in us; they help us fantasize.

HOW STORIES CREATE VALUE

When you design your brand identity, start by reflecting on how you want your ideal customers to think and feel about you. What are the words you would like them to use when they describe your brand? Remember, it is very difficult (and expensive) to get people to know much about you, so keep it simple and choose only a few values or personality traits, then think creatively how you could express those values and attributes in a compelling way that attracts people to your brand.

When you do the exercises, refer to the brand as if it was a person, regardless of whether it actually a company, product, service or anything else.

Ask yourself the following questions:

- Who are we?
- What do we believe in?
- What are our most important values? (keep it to 3-5)
- What are we like? (the characteristics that describe you)

Questions you will want to address later, as you design your visual expressions and communications include:

- How do we talk?
- (your tone-of-voice, e.g. relaxed, youthful, optimistic etc.)
- What is our style? (what is our look and style?)
- How do we behave? (how do our people behave as we interact with each other, customers etc.?)

Offering



Module overview

In this module, you will translate your customer insights and your strategy into a Brand Offering – a “cocktail” of value that will make your Ideal Customer want to choose only you. The Brand Offering is a combination of your product, service, environments, people and communications that, combined, create the brand experience. The brand experience, in turn, established the brand in the minds of people.

The difference between success and failure in business ultimately comes down to one thing: customer choice. Whether people choose you (your brand) or not comes down to the value your brand delivers, and more specifically, how relevant and different that value is. It all boils down to your Brand Offering, i.e., the total sum of perceived value in relation to price. In this section, you will translate your customer insights and brand strategy into a Brand Offering that your Ideal Customers will want to choose, over and over again.

The secret to customer choice

Do something for people no one else does

In today's world, brands are no longer created by communications (words, pictures, logos, etc.), not even product advantages and features. Instead, as competition becomes even tougher, it is critical to differentiate your offerings and create value across several dimensions. Brands today have to provide a better total experience, and often even more than that – a combination of function, experience, emotion, and meaning. Therefore, it is critical that you use your brand strategy to inspire all parts of your business.

As you know, by now, there are only three ways to grow revenue. You can increase the number of customers who buy from you, you can increase the value of the purchase, or you can increase the frequency of purchase. There are different strategies and tactics you can deploy to increase any of the three. However, all of them still require that people want to pay for what you offer. The best way to ensure that people want to buy what you sell (without dumping prices) is to provide something highly relevant and different. Put simply, it means doing something for people that no one else does.

In the last module, you defined your Onlyness, that one relevant thing that makes you unique. Your Onlyness is subjective (what is relevant to some people is not going to be relevant to others), and therefore you did the focusing exercises in the Customer module. By focusing on a specific group of customers, and by understanding more about them than anyone else, you set yourself up for creating extraordinary levels of value.

To create extraordinary value, you will often need to create value on multiple levels, combining function and utility with emotion and

meaning, even transformation. For this reason, in the Customer module, you were asked to understand not just who your Ideal Customer is, but what they want, how they want it, and why they want what they want. By tapping into this understanding, you should be able to design something unique, leading people to think of you as their “only choice”. This is the most core principle of this program. It is how you will build a brand faster, smarter than 99.9% of companies out there.

START WITH VALUE AND THE BRAND EXPERIENCE

As you probably have noticed, we have not talked about your core product or service up until this point. This approach turns the old product-driven model on its head. The reason for this is simple. Customers don't buy products. They buy the value that they provide. Therefore, we start with the customer and their perception of value, then create a Brand Offering that combines any or all of The Five Brand Dimensions. Together, these dimensions are how you “make the brand come alive,” and hence how you transfer value to people through their experience and the meanings that it evokes.

The Five Brand Dimensions

How your brand comes to life

Every brand is experienced through one or several of five brand dimensions. Let's say you walk into a hotel lobby. The hotel lobby is a "brand touchpoint," i.e., a place where you interact with the hotel brand (just like their website, advertisement, the hotel room, etc.). They experience you have in the hotel lobby will be affected by many things. On the one hand, you will be affected by the interior, the architecture and the style, the cleanliness, and other visual elements. You will be affected by the ambiance, the temperature, the sounds, and the scents. And, you are likely to be affected by the people, the other guests, but most importantly, how the staff treats you, how they behave, and what they do for you. As your stay at the hotel progresses, your experience is expanded, and therefore also your perception of the hotel brand. This is an example of the Five Brand Dimensions at play. Let's break them down one by one.

1. Product

Your core offering, i.e., what you make and sell. For example, at Starbucks, products include coffee, cookies, and refreshing drinks. The invention of new products and their delicious presentation and packaging establishes positive meanings among Starbucks fans.

2. Service

The intangible part of your offering that creates values. For example, at Starbucks, preparing coffee and delivering it to you is a value-adding service.

3. People

The attitude, manners, appearance, language, tone, and overall behaviors of the people who create and deliver the brand experience. For example, at Starbucks, people greet you with a smile and call out your first name to express the Starbucks brand experience.

4. Environments

The physical and virtual environments and channels that affect how the brand is perceived, from sourcing, manufacturing, design, distribution marketing, and sales. For example, at Starbucks, the cafeterias are designed to be "the third space," providing a comfortable space to hang out beyond your home and the office (or school).

5. Communications

The visual and verbal expressions of the brand, including the name, visual identity and style, imagery, marketing content (audio, video, visual and verbal messages). For example, on the one hand, Starbucks communicates its brand through its visual identity, expressed through the product, packaging, retail signage etc., but they also add meaning to the brand through value-driven campaigns (e.g. #pinkvoice for breast cancer, or by hiring veterans and military spouses). While these can be seen as tactical marketing by some, they are actually part of the brand offering because they add to the total value of the Starbucks brand.

Summary

All brands use one or several dimensions to deliver value and express their identity. The degree to which, for example, the People dimension matters is subject to which business and industry you are in. For example, fast-moving consumer goods are mostly dependent on the Product and Communications dimensions, whereas a hotel chain relies heavily on Environments, Service, and People.

How to work with the Five Brand Dimensions

To create more value than anyone else, and to differentiate your brand, use the Five Brand Dimensions as a framework for brainstorming new and different ways to create relevance, value, and meaning. Remember, you don't always need a superior product. Sometimes, the choice of the environment (where or when you make and sell) can provide the means for differentiation, just like e.g., packaging design, or useful content and community. Think creatively about each dimension, then design a strategy and tactics that work best for you.

Part 2: How will you make it real through the Five Brand Dimensions?



Product

Services

People

Environment

Communication

The Brand Offering is the manifestation of your brand. It results in the brand experience, which creates meaning, a.k.a. the brand.

Brand Touchpoints

In the first exercise, you designed your Brand Offering, the total value you will deliver to customers. Your Brand Offering manifests through one or several of The Five Brand Dimensions.

To further enhance the value of your Brand Offering, let's now explore the topic of Brand Touchpoints. You can think of a touchpoint simply as any point of contact between your offering and the customer. Put another way, the only way people can come in touch with your brand, is through your touchpoints. A retail store is a touchpoint, a booth at a fair, a website, customer service, even a business card.

Perhaps the easiest way to understand brand touchpoints is to consider the journey that people go through as they interact with a brand and its offering. There is always a process that customers go through as they make their way toward the progress they want. By first identifying what those steps in the process are, you can start choosing which touchpoints will be most relevant, differentiating, and value-adding for your brand.

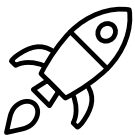
A simple way to do this is to first map the customer's journey on a simple, linear timeline. Then think through the steps customers might go through. And thirdly, consider which touchpoints could be involved in the steps.

Let's consider the example of renting a car for a holiday trip. The first step you go through

might involve searching for information about the destination, researching the area and its attractions, looking at maps and distances, then thinking about what kind of car you might need for your specific needs. You could define this step as "exploring for needs". Then, you might start searching for different car rental services online. Let's call this step "searching for car rental company." You get the point. (Remember, this is an exercise you should do with your Ideal Customers, as soon as possible).

As you map the whole customer journey (you can group them into three phases, e.g, the "before", "during" and "after" steps), then start imagining which touchpoints could be most relevant, differentiating, and value-adding for your brand. Remember, don't go for the obvious ones, instead try to think creatively about how you can create a new touchpoint, or how you can avoid one altogether.

Use the Customer Journey Map to go through this exercise. At the end of the exercise, choose the most strategic touchpoints for you. Remember, the more touchpoints you choose, the more work and cost it will mean, so choose only the vital few that really matter.



Want to take this to the next level?

If you want to take this to the more advanced level, you can interview your Ideal Customers and ask them about these steps, then ask them about their current experience regarding each step. Ask them "How important is this step for your outcome? Then ask, "What do you want from this experience ? and "What don't you want from this experience?. These questions will help you understand the kind of experience people want, and what they don't want. You can even give the answers a rating from 1-5 to capture opportunities for innovation.

For example, for most people, arriving after a long flight with your family at the car-rental check-in counter in a foreign country is a high-stress situation that can cause frustration. If car rental companies wanted to innovate and win over customers, they could reduce the pain of waiting in line, repeating the same order you did online and being upsold on various extras by removing the whole step from the experience and replacing it with a "key box", or a smartphone app.

Exercise: Customer Journey Map



Steps

BEFORE

DURING

AFTER

Key touchpoints

1		
2		
3		
4		
5		

Part 3: Designing your touchpoints

So far in this module, you have designed your Brand Offering, i.e., the total value your offer, and how to manifest it across The Five Brand Dimensions. Then, you identified the journey your customers have to go through on their way to reach their desired outcome. (These represent the WHAT and the HOW from the Customer module, by the way).

By now, you should have clarity on your Brand Offer, as well as which touchpoints you should invest your time and resources in. This leads us to the final part of creating your Brand Offering. Now we are going to design the touchpoints. This part is crucial to your success. Very often, the difference is created in the details.

Be creative when you do this exercise. Think about how you create some magic in those touchpoints that matter most. Also, think about how people will recognize your brand as they interact with you. What is your "signature"

experience? For example, Starbucks pay attention to small details, such as callin out your personal name as you order your coffee. Why do you think they do this? Well, because they know that people love hearing their own name more than anything else.

Your touchpoints are where the rubber meets the road. Your touchpoints are where the brand is established. As people interact with your touchpoint, they have an experience, and the experience creates the perception and meanings that get stored in the mind.

Exercise: The Touchpoint Design Canvas

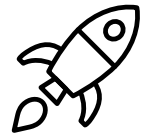


In this exercise, your task is to imagine how each of your key touchpoints will come to life. After you have designed each touchpoint (e.g., 4-8 touchpoints), you have a plan which you can put into action. You might want to work with one or several professional designers (e.g., graphic designers, interior designers, product designers) to help you turn your vision into reality.

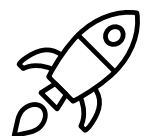
Here's how the tool works:

1. Give your touchpoint a name
2. Describe the touchpoint (what is it?)
3. Explain how you will bring it to life (draw, sketch, explain)

Print out as many sheets of the Touchpoint Design Canvas as you need. Think through how they all work together to reinforce a coherent brand experience. Once you are done with this step, you are ready to start building out the touchpoints (possibly with the help of designers, programmers, builders, copywriters, or whomever you might need).



Remember, pay attention to the details. Think through all the human senses (sight, touch, scent, hearing, taste, and ask yourself how you can stimulate people's senses and make the experience as desirable as possible.



Remember, a great touchpoint help customers move toward their goals in a desired way (a great experience), it is highly relevant (your customer feels like it was designed just for them), and it has a signature feel to it (it is distinctively yours).

Exercise: The Touchpoint Design Canvas



Name of brand touchpoints

Explain what it is

Explain how it works (draw, sketch, write)

Engagement



Module overview

In this module, you will design a plan for developing great relationships with your most potential customers, your Power Base. You will learn how to use engagement as your primary tool for relationship-building and marketing.

The value of your business is directly linked to the quality of the relationships you have with your best customers. The quality of your relationships with customers is essentially what makes up the value of your brand. Hence, your brand is (or should be) your most valuable business asset. This is a truth that many companies don't understand. They operate like their most valuable assets are their products, patents, logistics, their know-how, or anything that relates to their world. These things all matter, however, they are only a means to an end, and the end is called "customer choice." Your whole business is predicated whether customers choose your or now, how many customers you have, how much they are willing to pay, and how often they buy.

ENGAGEMENT - THE KEY TO BUILDING GREAT RELATIONSHIPS.

This module could have been called Marketing; however, that would have made it too broad. Nowadays, engagement is the heart of marketing, especially from a brand-building perspective. Therefore, we will not focus on tactical means for selling but rather on building strong and enduring relationships through engagement. In other words, we use engagement as a tool for relationship-building.

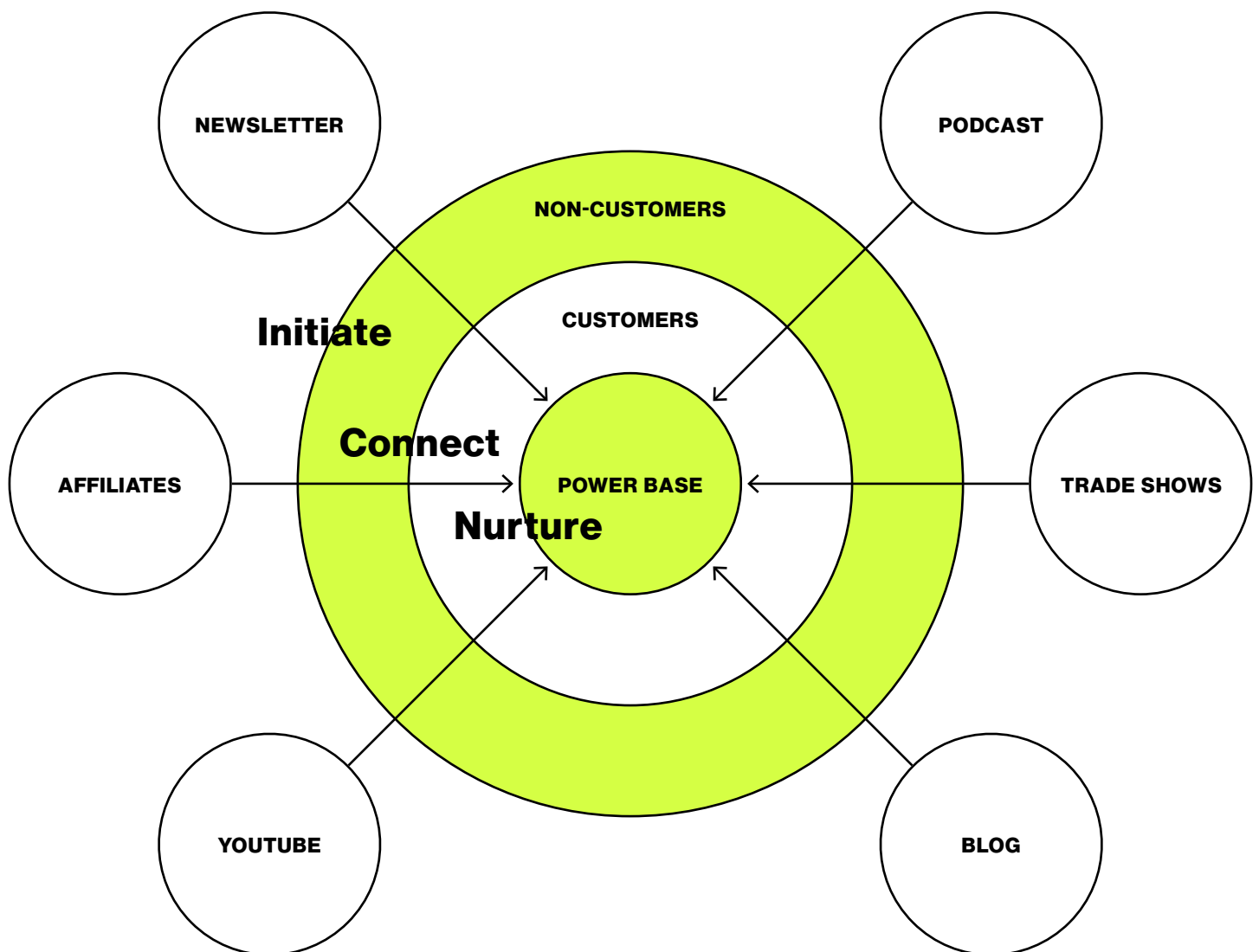
WHAT IS ENGAGEMENT?

You are probably familiar with the term "engaged to be married." In this scenario, two people commit to marrying each other. In other words, as engagement expert, Scott Gould says, "Engagement means togetherness." It is about getting people to say "I do." This implies a two-way commitment. If we take this idea to the world of business, it means that both parties are attached to each other, that there is a valuable exchange at play.

Now contrast this idea with the traditional view of marketing, which often is seen as a one-way street. Most companies simply broadcast their message down the throat of people, hoping that some people will buy. Engagement goes deeper. It takes much more, and the rewards are much higher. As we have established, engagement is a process for relationship-building, and the goal is to create strong relationships that endure.

The Engagement Loop

To build those strong, enduring relationships, you need to have a strategy and plan for how you go about building relationships. The Engagement Loop is a simple model that will help you create a strategy and plan for your engagement activities. The model is based on three types of activities;



Initiate

The first level of engagement is to Initiate relationships. Based on your Customer Blueprint™, you should have a good understanding of your Ideal Customer. Now is the time to put those learning into action. First, you need to think of how to find the people you want to initiate a relationship with. To do this, you have to figure out where they like to hang out. Are they active inside Facebook groups? Do they love Instagram? Are they lounging at the local Rotary club? If you have a well-defined Power Base and Ideal Customer, you should be able to find them through a bit of research. And you might need to use paid advertising, if you want to find more of them, faster.

Once you have found them, you must think of the right way to approach them and initiate a

conversation. This part is crucial. Every sub-culture or “tribe” has its own rules, mores that govern cultural behavior. You can think of this as the “code.” To better connect with people (level 2), it helps if you “speak their language,” and know their world. This is where the empathy and understanding you gained in the Customer module comes into play, big time.

Initiating can simply be about approaching someone at a fair or conference, as much as it can be about sending an email, a text message, or drawing them into your world by creating relevant content. For example, if you have a podcast, you can use it to initiate a conversation, especially if you have a clear call-to-action (e.g., an invitation to engage in a conversation).

Connect

The second level of The Engagement Loop is to Connect with the people with whom you have initiated a conversation. Again, if you know more about them than your competitors, you have a great chance to connect with your Power Base on a deeper level. For example, you might have a good understanding of other problems your Power Base typically have to deal with, besides the one you have a solution for. You might know someone who could help them and go out of your way to help them find other good

partners or brands, besides your self. Or, you could create value-adding content. There are no rules here, other than your goal of establishing a deep connection with people, and at some point, convert them into customers. A good rule of thumb in life is always to first do something for people (sometimes up to five times or so) before you ever ask for anything in return. This will set the good old Law of Reciprocity in motion. When you do something for people, they will want to do something for you.

Nurture

The third level of The Engagement Loop is to Nurture your existing relationships. As you know, with private relationships, they don't take care of themselves, you have to nurture a relationship.

This level is usually the most important, because of the old truth that getting a new customer is significantly more expensive than getting an old customer to buy again. These people usually already know, trust, and like you (your brand). In terms of brand-building, nurturing your most loyal customers (in your case, they should be your fans, not just customers) means continually focusing on providing them with new value, always seeking to take them to the next level in whatever they are seeking to achieve. For example, if you have a training business, you might connect with people through workshops or online courses. However, the next level would be live conferences or private coaching, more advanced and exclusive training, or it

could mean access to scarce resources, time with world-class experts, etc. It could mean “backstage” experiences, private tours, access to limited products, insider memberships, anything that makes them feel valued and special.

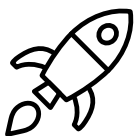
This level is where you have the greatest chance of becoming the only choice. There is always the next level, and your job is to keep nurturing your customers to retain them for life. There is often fantastic opportunity in designing your offering and your engagement activities with the customer lifetime value in mind.

In summary, The Engagement Loop is a model consisting of three levels of engagement activities, aimed at creating a constant, never-ending flow of warm new leads that convert into your best, longtime customers.

Exercise 1: Your Engagement Strategy



Now that you have an understanding of how The Engagement Loop works, it is time to make it work for you. Before you do this exercise, go through the different Engagement Tactics to get an understanding of which options are available to you. Before you start planning the different engagement tactics in detail, let's first explore the bigger, strategic questions.



Take a few minutes to think through the following questions before you dive into the different engagement tactics more in detail. Let's first explore how you can make them work for you.

Exercise 1: Your Engagement Strategy



1

What are you currently doing related to relationship-building that is working well?

2

What are you currently doing, or not doing, that is not giving you the results you want?

3

Given your current time and resources, how should you allocate your efforts across the three types of activities (Initiate, Connect, and Nurture)?



4

Which types of engagement tactics do you think will work best for you, given your business, customers, skills, time, and resources?

5

How will you discover where your Ideal Customers are currently hanging out? Make a list of at least five actions.

6

Which engagement tactics do you believe will work best for you to initiate new conversations and relationships?



7

Which engagement tactics do you believe will work best for you to connect with potential customers to convert them into happy customers?

8

Which engagement tactics do you believe will work best for you to nurture existing customers and turn them into lifelong fans that support your growth?

Notes



Exercise 2:

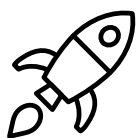
Plan your Engagement Tactics

At this point, you should have an understanding of what type of engagement activities you should be focusing on, given your time and your resources. You might feel a bit intimidated by some of the tactics and the ideas you have created, but don't worry, it will all work out if you just get going and start learning. Nowadays, you can find online tutorials about almost anything, from how to get the right podcast or video equipment to instructions on how to plan your content, produce and contribute it. So use the internet as your teacher for this part.

In this final exercise, choose the most vital engagement tactics and create a plan for how you will move forward. Remember to schedule time in your calendar for doing these activities! This is absolutely vital. The secret to this is relevancy and consistency. Your engagement plan and activities should be relevant to your Ideal Customer, and you should do them consistently! It is all too easy to fall off the wagon and not do this with the magnitude you need to cut through in today's world. You cannot over-expose yourself in the noisy world we are living in today, even if you posted content 100 times per day on your channels. Your engagement plan should be partially about content, but also remember, it could mean doing the good old stuff, like lunches and dinners, taking your clients to events, or whatever that you believe will work in your industry and situation.

Here's how the tool works:

1. Choose an engagement tactic that you believe will be vital for you.
2. Use the Brand Engagement Plan and work through all the headlines.
3. Do not worry about making it perfect; progress is more important than perfection.
4. Reserve time in your calendar to move your plan into action!



Make this exciting and fun! Be open to new ideas, and remember you will learn new skills if you have to, no need to worry!

Exercise 2: Your Brand Engagement Plan



What

What is your choice of engagement tactic?

Why

What is the purpose of this tactic?

When

When will this happen?
(e.g., one time, monthly, weekly, daily)

When will you produce it?
(schedule time in your calendar)

Who

Who should be involved in making it happen? What are their roles?

Where

Where will it take place?
(which distribution channels, event, place etc.?)

Where will planning and production happen?

How

Describe and visualize how you see it working, and what you need to make it happen.

Operations



Module overview

The final, and the most decisive area of The Six Areas Of Brand Mastery is called Operations. The purpose of this module is to operationalize your brand. What this means, essentially, is that you connect it to all areas of your business, so that everything works as a system, enabling you to scale and grow profitably.

A business is a system. Nothing works in isolation. However, most brand-building efforts, particularly inside medium- to large-sized organizations, are made in isolation from the core business operations. This is a big mistake. You need every part of your business align behind your brand strategy, in order for you to keep creating exceptional value for your customers over time. You are likely not competing only with products, nor only with services. Whether you are alone or run a larger organization, all parts need to play together to create a bigger whole. To build a great brand that can scale profitably, you need an "operating system" (and culture) that reinforces the right behaviors.

The secret to profitable growth

One of the many reasons companies never create profitable growth is that they focus on too many things, and as a result, they never reach above-mediocre levels of results in all these areas they are trying to focus on. Too many customer segments, trying to serve too many needs, too complex processes, too many different kinds of people trying to get the job done, and as a result, the business is in a reactive state, always desperate for cash. Sound familiar?

This is one of the reasons why over 60% of companies in the U.S (some 20 million companies) never turn a profit, and the majority of them lose money.

There are many reasons why this is happening, but one stands above the rest. These companies never built a brand. They are now known, and people don't understand why they should choose them. These are the external factors. The internal root causes can be found in the way these companies are managed, as explained above.

The secret to profitable growth is simple. You first have to find a way of doing business that is profitable before you scale it. Simple, right? Unless you are starting out right now, this might mean you have to prune and weed before you nurture and growth. As you have learned in this program, you must first find the profit potential,

e.g., the most potential customer segment, and then build your business to serve that segment. What usually happens is that instead of focusing only on the vital few things that matter, companies think they can grow in all directions. This is a dangerous mindset.

Sometimes you need to over-invest, granted. But investing where there is no profitability, where you have no proof that profits exist is just risky or downright stupid. The secret is to find the profitable part of your business, then focus only where it matters, and as you hit higher profit margins (and gain cash), you reinvest it in the right type of growth.

The magic of the 80/20 rule

Let us imagine you have a business that makes 1 million dollars in sales per year. And let's assume you make 100,000 dollars in profits (10%). The 80/20 rule says that about 80% of that 100,000 in profits came from around 20% of customers. So, in essence, around 200,000 of sales resulted in 80,000 dollars of profits. That's a 40% operating margin, compared to 10% where we started. If this is true, perhaps you

should consider getting a deeper understanding concerning who the most profitable customers are and why they are profitable. You might actually first shrink your business, both in terms of revenue and people, but then, as you understand where your focus should be, you start scaling from your profitable core. That, is the secret to profitable growth.

And hey, wouldn't you rather choose a smaller business that makes more profits than a larger business that makes less in profits?

You might think this theory is overly simple and it is easy to critique it and think it won't work for you for one reason or another. Sure, this strategy sounds too simple and almost too good to be true. However, if you started analyzing how many of the most successful brands grew, you will find that they, almost without exception, started highly focused and grew profitably from this core.

When Steve Jobs returned to Apple in 1997

In 1997, as Apple Computer was on the verge of bankruptcy, Steve Jobs was brought back, first as a board member, then soon later as CEO. One of the first observations he made, in a speech at Macworld (1997), where he talked about how to make Apple healthy again, was: "Apple is not as relevant as it used to be everywhere, but in some incredibly important market segment, it is extraordinarily relevant."

He also said, "Apple is executing wonderfully on many of the wrong things". What he was referring to was that there was no real strategy in place. And a strategy is almost a direct synonym for the word "focus".

The cure, Steve continued, was to "find where Apple is still incredibly relevant and focus on those areas. It needs to find its core assets and invest heavily in those. Apple was still "the dominant leader for creative professionals". Steve then went on to kill almost all the new products the company was focusing on. He only left a handful. Among them were the iMac, the PowerBook, the iPhone, and the iPad. And as they say, the rest is history.

The learning here is that regardless of the size of your company, a highly focused strategy can always bring extraordinary results. Do you see how powerful The Only Strategy can be? Steve Jobs practically spelled it out in this speech, as have many other companies before and after him.

THE PRINCIPLES OF OPERATIONAL DESIGN

To build a fast, agile, profitable operational system, look to the following key principles; Keep it simple. Focus. Build a system. Steve Jobs was a great simplifier, and he was great as focusing. And one of the greatest "systematizers" of modern times were the founders of Mac Donalds. The MacDonald brother used the principles of scientific management to build the world's best hamburger delivery system.

In this last area of The Six Areas Of Brand Mastery, we will apply these principles to your business. Again, the goal is to operationalize your brand by connecting it to all the core areas of your business. This way, you will be able to focus on providing more value for your customers, and consequently, more growth and profits for your business.

Exercise: Designing your Brand Operating System (BOS) – Part 1

The BOS (Brand Operating System) is simply a system of interrelated things that should work together to create and deliver value for customers, and for the business. It consists of a big-picture view (The System), and the operational plan for each of your focus area (Focus Area).

As we have established, a business is a system, and nothing works in isolation. So first, let's focus on the big picture. In this first exercise, you will first map the most vital focus areas of your business. A focus area is an area of your business that represents a set of activities that are vital to the performance and results of your business. Your focus areas are (or should be) connected to each other and work seamlessly together. For example, a focus area could be called "Selling" and it could relate to the key activities of a) identifying leads and prospects, b) meeting potential clients c) making offers and closing (as an example). Or, if you are marketing mainly through an influencer community, you could call it "Managing the community", which could relate to the key activities of a) finding suitable influencers, b) engaging with them to create relationships c) create and launch joint marketing activities. I am sure you get the gist. Here is a breakdown of how this first part works.

Step 1

Start by listing between 3-10 focus areas. Depending on what business you are in, you might define them with words that suit your culture and organizational model. For example, if you're selling clothing online, and Instagram is a major channel for you, "Content creation" might be one of the most important focus areas for you. Content creation is a set of activities involving, for example, the planning, production, and distribution of images, videos, and copy. In a sense, each focus area is a "system within the system" of your business. Now, what we want to do is first to identify those systems. Let's stick with the word Focus Area, to avoid confusion.

Examples of focus areas could be:

- Delivering the customer experience
- Creating content
- Developing learning content
- Servicing customers
- Uncovering new customer insights

Make sure how you name your focus area is easy to understand, and suggest some form of action toward and outcome.

Step 2

Now, after you have thought through your business and identified different focus areas, pick ONE main focus area that you consider to be the most important one. This focus area is typically the one area which relates to the most important way you create and/or deliver value to customers. It is typically what makes or breaks your business. And secondly, it might be the “center stage” area that connects to all your other focus areas and activities. For example, if “Content creation” is your most important activity, then that might be because it feeds your product development, your marketing, your core offering, etc. The idea is that the sum becomes greater than the parts, so look for ways to streamline and simplify here. That is what operationalizing is about.

This might feel difficult, as all the focus areas are connected. However, do this nonetheless. Just go with your gut feeling.

Step 3

Decide on a maximum of five (5) focus areas, no more. Again, the goal is to simplify and focus on the vital few things. If you end up with less than five, that’s good. Just make sure all your most vital business areas are covered.

Step 4

Go through your focus areas and identify the most important activities related to each focus area. Draw the system on a piece of paper (and your last version in the workbook). Do this enough times until you think you have designed a simple, powerful Brand Operating System.

Step 5

Do this until you have removed everything unnecessary, and you have in front of you what you believe to be a lean machine, a.k.a a Brand Operating System.

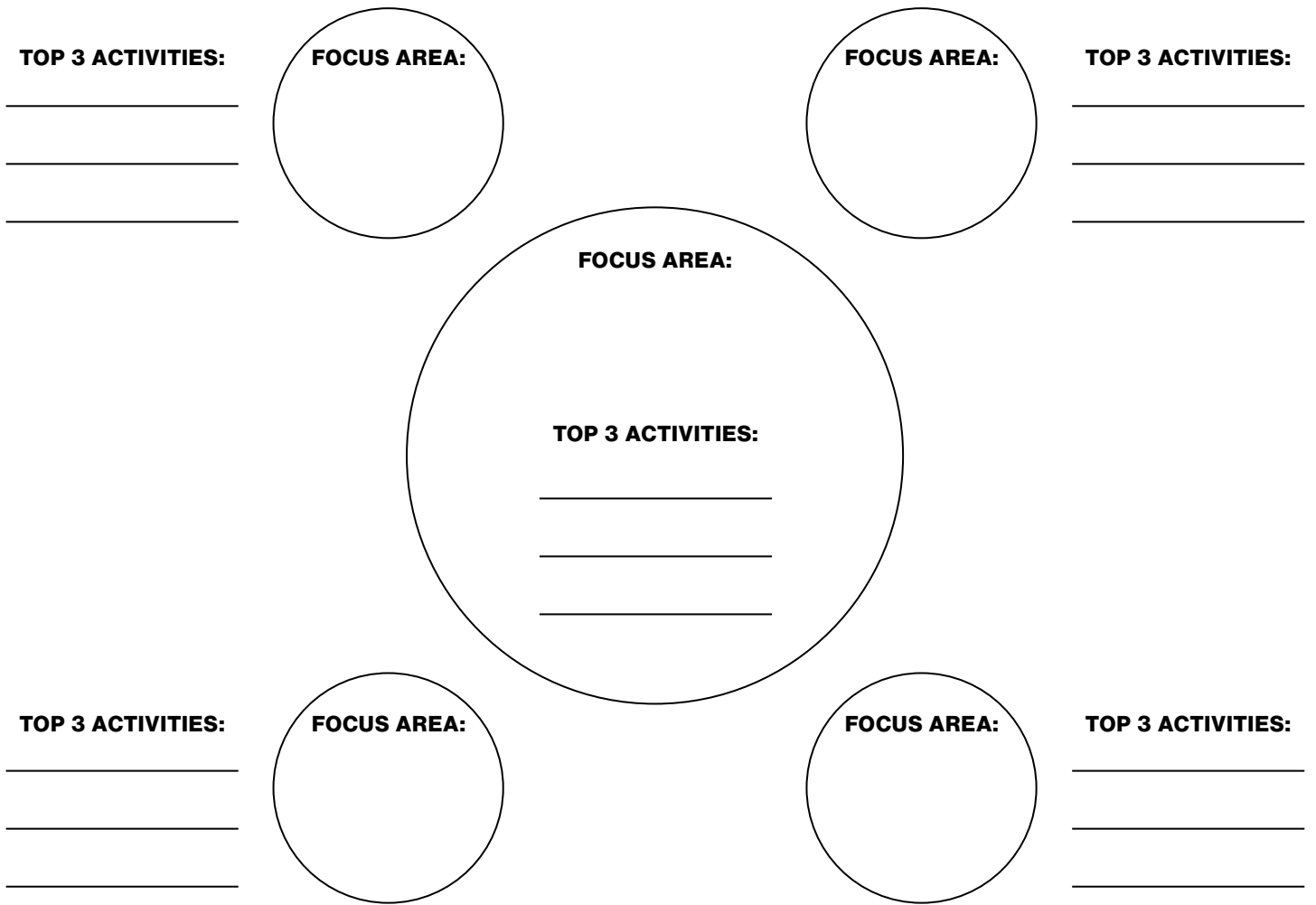
The Brand Operating System™



Part 1: The System

HOW IT WORKS

1. List potential focus areas below
2. Choose a max of 5 focus areas
3. Select the most important and place it in the center
4. Name all focus areas
5. List the top 3 related activities for each area



Exercise: Designing your Brand Operating System (BOS) – Part 2

Now that you should have a good “big picture” view of how you want to run your business to maximize simplicity, speed, and efficiency, it is time to dive into each of the focus areas and make more detailed plans. If you are just starting out, or your business is extremely simple, you could just work forward with the big picture view (Part 1: The System). However, it pays off to plan each focus area well in order to build a high-performing brand and business.

Here's how it works

Use the BOS framework (Part 2: Focus Area) and use as many sheets of paper as you need to cover all of your areas (max 5, remember?). Work through each of the headlines of the 5 P's Of Operational Excellence. In other words, you are designing how both the big picture (The System) works, as well as the parts. The reason this is so important is that people typically don't know how to execute against your brand strategy and brand offering, and this will provide them with a working manual. Again, don't try to get too detailed or perfect the first time, just get it done. This is work that you can, and should keep coming back to and improve your system.

Here is how the tool works

Give your Focus Area a name that best represents the activity you want. Keep it short and descriptive of the outcome you want.

For example:

“Selling”, “Engaging with customers”, “Content creation”, “Product and service development”, “Partnership management”, or “Sourcing high-quality producers”.

Purpose

In this part, ask yourself why this Focus Area exists, i.e. what its purpose is.

For example:

“The purpose of “Content Creation” is to continually produce and distribute value-adding content to create leads and relationships with new and existing customers.

Performance

Define the performance you want; in other words, the desired outcome. Start by listing the results you are looking for, then set a KPI (Key Performance Indicator) to have something to measure your success against.

For example:

“The purpose of “Content Creation” is to continually produce and distribute value-adding content to create leads and relationships with new and existing customers.

Put in more simple language; you want to answer two questions here:

1. What do we want to happen?
2. How will we know when we are successful?

Principles

List down the guiding, operational principles that relate to your chosen focus area. Principles are fundamental truths, ideas, or beliefs that you believe will be worth adhering to by anyone involved with these focus areas. If you want, you could describe them more in detail in your own version of The Brand Playbook™. More on that in the next exercise. You can make the principles lofty and top-level, or more detailed, depending on which style works best for you.

Here is a list of some random principles that could apply to different businesses:

“Create one high-quality content piece, then break it down into multiple posts.”

“The fewer ingredients, the better the outcome.”

“Simplicity is the ultimate form of sophistication.”

“Always keep the sugar to less than 10% of the total calories.”

Process

Unless you have a clear, repeatable process for what you do, it will become difficult to scale and grow. List down the key activities in sequential order (steps) to gain clarity on how to create maximum results within the focus area. Try to simplify as much as possible, and focus only on the vital few activities that produce the most outcome. After all, you can only outperform the competition in so many ways.

People

Ultimately, nothing happens without people taking action. In this section, think about which people are most suited to perform the activities that are needed to create the best possible results. Consider their qualities, skills, values, and attitude. Write down either their exact names or just the roles. Then write down what particular key activities they should focus on.

The Brand Operating System™



Part 2: Focus Area

Focus area:

Purpose

What is the purpose of this focus area?

Performance

What results do we want and how do we measure success?

DESIRED RESULTS

1.

2.

3.

4.

5.

6.

KPI (How we measure success)



Principles

Which principles should govern how we do things in this area?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Process

What are the actions and steps needed to be successful in this area?

People

Who are the people involved, and what should they focus on?

The Brand Playbook™

Now that you hopefully have worked through all the modules, or have existing content and solutions for each module, it is time to put it all together. This might sound like a monumental task, but if you have been using the playbook and completed the exercises, this does not have to require so much effort. And like everything in life, besides breathing and paying taxes, this is optional.

The final step is now for you to go through everything you have created and weed out anything unnecessary. You might also need to go back and complete some exercises which you believe need more work. And then, ask yourself which format will best serve you. For example, if you have a team and you want everyone to have a copy of your playbook (suggested), then you might want to transfer the contents into a PowerPoint, or Keynote presentation. This will take some effort, but it can really make a difference. For example, your Customer Blueprint™ becomes more valuable as you update it with new discoveries and fill it with images and stories. You could even turn it into a coffee table book for your office. There are no limits, and you have to decide what works best for you.

The Brand Playbook™ (this workbook and manual) was designed to guide you through the process of creating and managing your brand. As you will have noticed by now, it is very broad in scope. You might actually feel overwhelmed and exhausted by now. To that, I can only apologize and say what your mother would tell you; “It is in your best interest, my dear.”

The purpose behind this is that to make a brand work today; you need to connect it to all parts of your business. Think of your brand as a system of interrelated areas. Each of these areas needs your ongoing care and support. The world never stands still, and neither should you.

As you move forward, you can come back to this playbook to solve one specific problem you have, or to pursue a specific opportunity. This is not a brand strategy; it is a complete brand-building system. All the modules represent one of The Six Areas Of Brand Mastery™, six interrelated areas that the world's most successful companies master. If you start failing in one, you are likely to start failing in other areas. For this reason, we suggest that you keep focusing on these six areas, while you also focus on the focus areas you defined in your own playbook.

Think about the ideal format for your own Brand Playbook. If you want, give it your name, your style and keep adding to it, or remove something from it.

This material was designed to help you forward, but it will need your personal touch and voice.

Make it your own.

Own it.

Do it.

This is your life.

Make it a great one.

