pivot

The Brand Change
Master Class

Workbook

Version 1.0

pivot The Brand Change Master Class

A

Pivotal Moments Checklist

Accompanies Video 2

Your reimagined future is wrapped in these pivotal brand moments. Which of these is your company or organization currently facing?

Structural Change: To accommodate structural change	Yes	No	Maybe	N/A
Merger and acquisition				
Spinout				
Strategic Repositioning: To effect strategic positioning				
Change direction				
Broaden scope / scale / visibility				
Narrow the scope				
Change internal culture				
Change perceived composition				
Branding Functionality: To improve branding functionality				
Name weakness				
Name confusion				
Design weakness				
Advertising breakthrough ↯ Geico Lizard, Aflac Duck, Michelin Man, etc.				
Legal requirement				

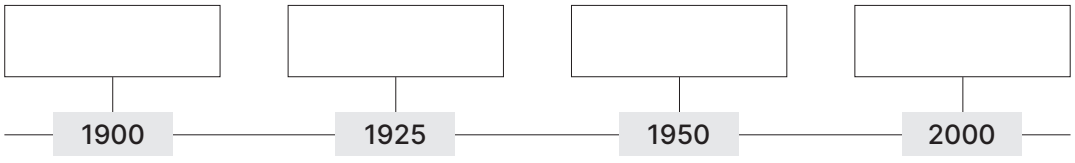
Of the drivers you marked as "yes" above, which is the most critical or important and why?

QUIZ

This timeline showcases the evolution of branding over the last 100+ years. Use the provided key to fill in the boxes to determine the correct order.

Key

A. Identification
B. Features
C. Experience
D. Benefits



Completed by (your name): _____ On (date): _____

Ideal Self-image

Accompanies Video 3

Every organization's customer base has a unique set of shared common traits. So think about your "customer tribe" and list as many traits as possible.

Traits Identification	
Do they have rules?	
What do they believe?	
What habits do they have?	
What do they like?	
What do they NOT like?	

Self-image Identification

After looking through your customer's identified traits, try to narrow in on what you think might be their self-image.

Who do you think they are?	
What do you think they want?	
How do they belong?	

Company Traits Identification

Please answer these questions to identify your company traits and see how they align with your customer base.

Why do we exist as a company?	
What is it that we offer?	
How do we behave as a company?	

Completed by (your name): _____ On (date): _____

Brand Iceberg Structure

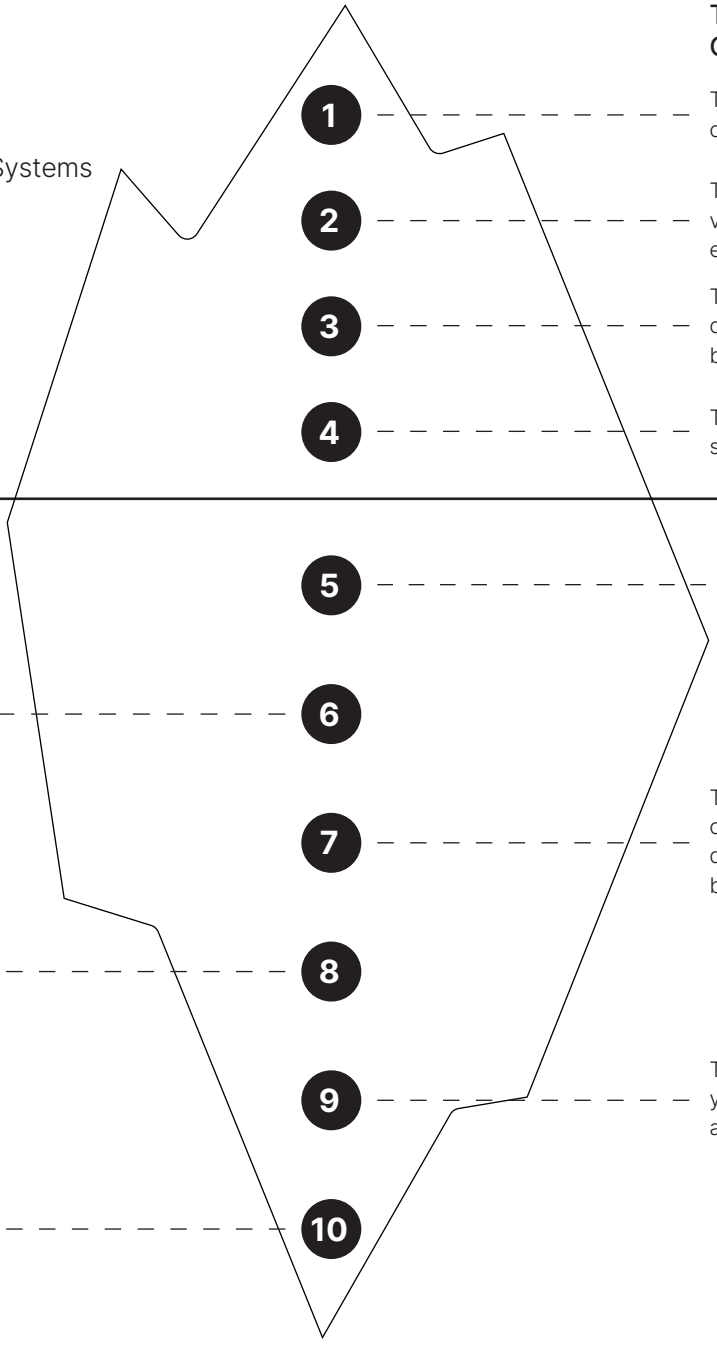
Accompanies Video 3

Use the provided key to fill in the dotted lines with a brand element that corresponds to each listed definition.

QUIZ

Brand Elements Key

A. Brand Promise
B. Marketing Strategy
C. Positioning and Propriety Systems
D. Core Values
E. Logo
F. Personality, Voice, & Core
G. Brand Mission
H. Tagline
I. The Offering
J. Visual Identity



The Visible Brand: On the surface

1 _____ The icon and mark are the core of the visual brand.

2 _____ This memorable phrase is a quick, visible distillation of your brand experience and who you are.

3 _____ The critical design elements that complement the logo, express the brand, and tell your story visually.

4 _____ These are the actual goods and services sold.

The Perceived Brand: Below the surface

5 _____ These are the defined outward attitudes, methods, and messages that help audiences understand you and know that you understand them.

6 _____ The defined audiences, media channels, and marketing methods that will determine how customers interact with the brand and how brands communicate with them.

7 _____ The core to differentiating your offering from the next one. This defines the methodology and beliefs that truly sets you apart.

8 _____ It defines the core benefits of what the brand offers and how it transforms your customers' lives for the better.

9 _____ The mission quickly explains why you exist as a company, your impact, and the big-picture goals.

10 _____ These beliefs and behaviors should be cemented and should be reflected in every layer above.

Completed by (your name): _____ On (date): _____

Brand Molecules

Accompanies Video 3

What comes to mind when you look at the following various known companies?

Imagine your company logo is sitting below this sentence, what comes to mind when you look at it?

Completed by (your name): _____ On (date): _____

Branding vs. Marketing

Accompanies Video 3

Identify which of the following is branding vs. marketing by placing an “x” in the appropriate column.

QUIZ

	Branding	Marketing
Why		
How		
Short-Term		
Long-Term		
Macro		
Micro		
Defines Tactics		
Defines Trajectory		
Builds Response		
Builds Loyalty		
Creates Value		
Extracts Value		
Is the Doing		
Is the Being		

Completed by (your name): _____ On (date): _____

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F

Transformational Rebranding

Accompanies Video 4

Rank the following process components on a scale from 1-5 and determine what complacency factors you may have.

Transformational Rebranding Process	1 (somewhat)	2	3	4	5 (very much)
1. Is there enough inertia for this? You're going for cultural renewal and changing the conversation about your brand. Is everyone warmed up to this idea? They need to be.					
2. Have you organized a Mars Team, or guiding group, to take this on? Have you created the conditions where everyone can do their most courageous thinking—together?					
3. Does everyone understand the process and the level of commitment and perseverance this is going to take?					
4. Do you have the right balance of leadership and management on board?					

Complacency Factors	Yes	No	Maybe	N/A
Too much happy talk from managers				
No visible crisis				
Low-performance standards				
Employees with narrow functional goals				
If you're measuring the wrong KPIs				
Customers' feedback on insufficient performance				
A kill the messenger or low candor culture				

What is the reasoning behind your highest ranked? And of the complacency factors you marked as "yes" above, which are the most concerning?

Completed by (your name): _____ On (date): _____

Mars Team Construction

Accompanies Video 4

Create a team of leaders and managers who will be going to produce a new transformed brand on planet Mars. Who will you choose?

The following people should be on your Mars team.

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

Based on the team you've created, do you feel confident they'll provide the right mix of leadership influence and management process?

Four Key Characteristics Checklist	Yes	No	Maybe	N/A
Powerful: Are enough key people onboard, especially mainline messengers, to keep those left out from blocking progress?				
Experts: Are various points of view represented so that intelligent and informed decisions can be made?				
Credible: Do the individuals in the spaceship destined for Mars have good enough reputations with their colleagues so the work will be taken seriously by others?				
Leaders: Does the group include enough proven leaders who can drive this change?				

Common Errors to Avoid Checklist	Yes	No	Maybe	N/A
Failing to create a powerful Mars team				
Underestimating the power of vision				
Under communicating the vision				
Permitting obstacles to block the vision				
Failing to create short-term wins				
Declaring victory too soon				
Neglecting to anchor changes firmly in the corporate culture				

Completed by (your name): _____ On (date): _____

8-Step Process

Accompanies Video 5

Match the following definitions with the correlating phase.

QUIZ

Definitions	Phases
• Change systems or structures that undermine the new brand.	1. Establish a sense of urgency
• Create better performance through customer and productivity oriented behavior, more and better leadership and more effective management. Hire, promote and develop people who can implement the rebrand vision.	2. Create your Mars Team
• Examine the market and competitive realities.	3. Develop a vision and strategy
• Create a vision to direct the rebrand effort.	4. Communicate the change vision
• Visibly recognizing and rewarding people who made the wins possible.	5. Empowering broad-based action
• A group of people with enough power to lead.	6. Generate short-term wins
• Use every vehicle possible to constantly communicate the new vision, strategies and brand.	7. Consolidate gains and produce more change
	8. Anchor the new brand in the culture

What is the key takeaway you've learned in order to become successful with the 8-step process?

Vision Creation

Accompanies
Video 6

Provide some examples of the vision you see for your company or organization for each of the following below.

1. Desirable

2. Feasible

3. Focused

4. Flexible

5. Conveyable in 60 seconds

Of the five key points of vision listed above, which is the most critical or important and why?

Completed by (your name): _____ On (date): _____

Professional Interest Chart

Accompanies Video 7

Fill in the following blanks based on the provided interests that correlate to each quadrant.

QUIZ

1. _____ 3. _____



Left Brain
Management by:
_____

Right Brain
Management by:
_____

2. _____ 4. _____

Of the four quadrants shown above, which one best matches what your leadership is interested in and why? And which one of those words more closely align with the purpose of your organization?

_____

_____

_____

_____

Completed by (your name): _____ On (date): _____

High vs. Low Entropy

Accompanies Video 7

Read each question carefully, and then circle the answer that best fits the question.

QUIZ

1. In the language of entropy, it's more likely to always decrease over a period of time.
   A. True
   B. False

2. The likelihood of transforming from a high entropy to low entropy is extremely high.
   A. True
   B. False

3. There are a couple of ways you can rearrange the components and still remain at a high entropy state.
   A. True
   B. False

4. In terms of rebranding, understanding your current level of entropy will allow you to make the necessary changes before it's too late.
   A. True
   B. False

5. If your organization is too low of entropy, you'll need to get the culture to a higher entropy state.
   A. True
   B. False

6. This level of entropy means if anything were to change, there would be little to no impact on the overall structured shape.
   A. Very low
   B. Low
   C. High
   D. All of the above

7. This level of entropy is defined as a much more ordered state.
   A. Low
   B. Medium
   C. High
   D. Very high

8. In the video, what was the metaphor that was used to explain the meaning behind entropy?
   A. Rice grains
   B. Sand pile
   C. Glass castle
   D. None of the above

Based on the information that you've learned, is your company or organization's level of entropy high or low? What factors have led to your conclusion?

Leadership Styles

Accompanies Video 7

Match the following definitions with the correlating leadership style.

QUIZ

Definitions	Leadership Styles
• Makes the decisions on their own. Others comply.	1. Situational
• Makes the final decision.	2. Bureaucratic
• Mentors, Instruct and train the team.	3. Servant
• Follows hierarchy.	4. Transactional
• Focuses on clear communication, goal-setting, and employee motivation.	5. Transformational
• Mostly hands-off and give others the freedom to make decisions.	6. Innovative
• Is confident and strong.	7. Democratic
• Lives by a people-first mindset.	8. Autocratic
• Considers the uniqueness of every situation and adapts if needed.	9. Laissez-Faire
• Is a visionary. Has the ability to influence others.	10. Charismatic

Of the listed leadership styles above, what type of leader are you or that you're working with? What are the advantages and disadvantages of this leadership style in regards to your rebranding effort?

Completed by (your name): _____ On (date): _____

Communication Goals Checklist

Accompanies Video 8

Which of the following communication goals for your rebrand are applicable and most critical?

Structural Change: To accommodate structural change	Yes	No	Maybe	N/A
Merger or acquisition of equals; best of both				
Transforming the surviving merged brand				
New vision, forget the past				
Preserve existing equity				
Express a new vision				
Strategic Repositioning: To effect strategic positioning				
Redefine industry				
Redefine core competence				
Remove limiting category association				
Remove limiting geographic association				
Enhance size perception				
Elevate public profile				
Express a more specific focus				
Enhance pride and confidence				
Refresh and redirect competitive energy				
Transfer affiliation from unit to parent				
Renew / refresh public image				
Redefine the defining units				
Modify parental “umbrella” presence				
Branding Functionality: To improve branding functionality				
Increase name impact and recall				
Increase name differentiation				
Increase visual strength and quality				
Incorporate a breakthrough advertising element				
Retain or transfer brand equities				

Of the communication goals you marked as “yes” above, which are the most critical and why?

Completed by (your name): _____ On (date): _____

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N

Auditing Your Brand Checklist

Accompanies Video 9

Which of the following brand audits are applicable for your company or organization?

Brand Profile	Yes	No	Maybe	N/A
Can you be categorized?				
Do you have a purpose?				
Do you have a positioning?				
Do you have a motto or tagline?				
Can you define your stage of competitive lifecycle?				
Do you have a brand architecture style?				
Culture Audit				
Do you have ways to distribute authority?				
Do you have methods for decision-making?				
Do you have ways to clarify behaviors for reward / punishment?				
Do you have any rituals?				
Do you provide psychological safety?				
Do you have signature stories about your company?				
Do you have company proclivities?				
Personality Audit				
Do you have a defined archetype?				
Have you determined and articulated your personality traits?				
Do you have a tone of voice?				
Have you performed a style audit?				
Can your brand be visually expressed?				
Do you have a memorable brand identity?				
Brand Audit				
Have you determined your impact to be created?				
Have you determined your next level of success?				

Of the audits elements you marked as "yes" above, which are the most critical and why?

Completed by (your name): _____ On (date): _____

Designing Your Customer Checklist

Accompanies Video 10

Which of the following items have you accomplished when designing customers for your company or organization?

Five Motives for Customer Participation	Yes	No	Maybe	N/A
Information: they want to know				
Self-discovery: they want to learn				
Social integration: they want to fit in				
Social enhancement: they want to improve				
Entertainment: they want to enjoy				

List of Customer Characteristics				
Define and understand their rules				
Define and understand their beliefs				
Define and understand their habits				
Define and understand their likes				
Define and understand their dislikes				

QUIZ

1. List three things you need to make a great brand.
   -
   -
   -

2. A company's main asset isn't its tribe of customers, but its product.
   A. True
   B. False

3. What do old brands require to thrive?
   A. Compliance and distribution
   B. Compliance and consumption
   C. Collaboration and management
   D. Both B and C

4. What do new brands require to thrive?
   A. Sharing
   B. Affiliation
   C. Adapting
   D. All of the above

Of the customer characteristics you marked as "yes" above, which are the most critical and why?

Completed by (your name): _____ On (date): _____

Positioning Checklist

Accompanies
Video 10

Do you know who the top 5 competitors are in the minds of your customers?

List 5 top competitors of your company.	Summarize their positioning and personality.
1.	•
2.	•
3.	•
4.	•
5.	•

What ways can your brand be truly different?	Yes	No	Maybe	N/A
By design				
By tribal customs				
By convenience				
By scope				
By ideology				
By product / service				
By customers				
By large size				
By location				
By speed / ease				
By low pricing				
By high pricing				
By quality				
By wide range				
By small size				
By people				
By friendliness				

Of the ways to be different you marked as "yes" above, which might matter most to customers and why?

Completed by (your name): _____ On (date): _____

Competitive Landscape XY Axis

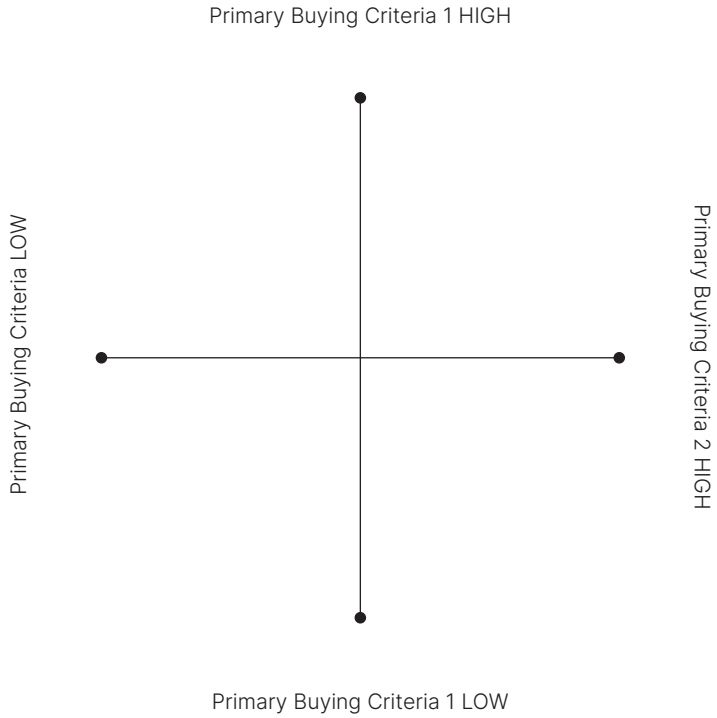
Accompanies Video 11

With your competitors in mind from workbook P, follow the directions below to accurately plot your criteria grid.

Directions to plot your criteria grid:

1. Assign the two must-have customer buying criteria to each axis. For example, when evaluating a car to purchase, the buying criteria might be price and reliability. Each axis represents the high to low value of that criteria that each competitor - and your brand - bring to the table.

2. Next, plot your competition and yourself on the grid of buying criteria you've created.



QUIZ

1. If your company can create the must-have criteria, you can bend customer preferences in your favor.
   A. True
   B. False

2. Who is your real competition?
   A. Market
   B. Clutter
   C. Order
   D. None of the above

Based on your marked points on the criteria grid, do you feel confident you can control the category? Explain why or why not?

Completed by (your name): _____ On (date): _____

Crafting Your Strategic Brandscape

Accompanies Video 12

Thoughtfully complete each area to craft a clear and concise brand strategy for your company or organization.

The _____ Brandscape

Target Audience(s)

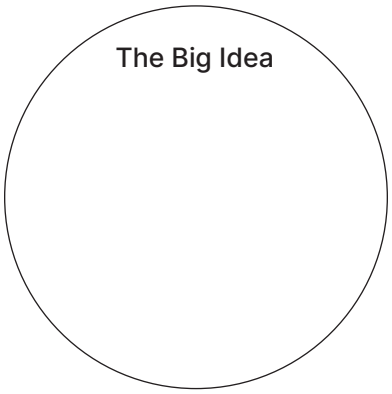
Purpose

Mission

Vision

Competitive Advantages

The Big Idea



Core Values

Positioning

Only statement

(company) is the only _(category)_ that _(unique offering)_ that _(benefit)_.

Brand Promise

Key Competitors

Personality, Voice, Tone, Imagery

Culture

Completed by (your name): _____ On (date): _____

Five Universal Demands Checklist

Accompanies Video 13

Identify which of the following factors or drivers are applicable for your company.

Purposeful: Structural, strategic, functional	Yes	No	Maybe	N/A
Merger or acquisition of equals; best of both				
Transforming the surviving merged brand				
New vision, forget the past				
Broaden scope / scale / visibility				
Remove limiting geographic association				
Express a more specific focus				
Change internal culture				
Renew / refresh public image				
Change perceived composition				
Resolve name weakness				
Resolve name confusion				
Repair design weakness or satisfy a legal requirement				
Capitalize on advertising breakthrough				
Procedural				
Receive input from people at all levels				
Build an understanding and consensus				
Set goals and deadlines				
Purifying				
Refine visually				
Refine verbally				
Refine positioning				
Proven				
Ensure vision from people at all levels				
Demonstrate, explain, and verify new identity				
Powerful				
Distribute brand energy				
Move forward a company or organization				

Completed by (your name): _____ On (date): _____

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Thank you!

You have completed Pivot, The Brand Change Master Class.

Notes