

Brand Health Guide

A healthy brand drives growth



S.O.
CREATIVE

Contents

Introduction

- 3 How S.O. Creative Helps Brands Grow

Section 01

- 4 The Connection Between Robust Sales & Brand Health

Section 02

- 7 Setting a Course: Your Mission & Vision Statements

Section 03

- 10 Your Brand Values

Section 04

- 12 Understanding Your Market: Your Competition

Section 05

- 16 Understanding Your Market: Your Customers

Section 06

- 19 Bringing Your Mission, Vision and Values to Life Through Branding

Section 07

- 22 Knowing When It's Time to Rebrand

Section 08

- 25 Communicating Your Brand Through Effective Content

Section 09

- 32 Leveraging Marketing Automation to Maximize Branding ROI

Section 10

- 34 Keeping Your Brand On Track With The Right Metrics

Section 11

- 38 Keeping Your Brand On Track With The Right Analytics

Introduction

How S.O. Creative Helps Brands Grow

At S.O. Creative, we understand that effective branding and marketing strategies are critical for businesses to succeed. That's why we've dedicated ourselves to helping companies grow and reach their goals for over 25 years.

We will take the time to understand your business, goals, customers, unique challenges, and help you develop a robust brand strategy that aligns with your objectives to build your business.

If you find all this daunting and overwhelming, don't worry - we are here to help. We will guide you through the process every step of the way and ensure that your brand and marketing efforts successfully reach your goals. That's our brand promise, and we've been keeping that promise through the many B2B brands that have partnered with us. Our work speaks for itself, so we invite you to see how we apply the brand strategies in this book.

- [Improving Lead Generation](#) in the Petroleum Refining, Gas Processing and Chemical Industries (Merichem)
- [Building Brand Awareness](#) for an Industry Innovator in Process Technologies (GTC Technology)
- [Re-Branding and Growing Brand Awareness](#) for a Successful Landscaping Firm (Serpico)
- [Building a Stronger Online Presence](#) for an Industry-Leading Manufacturer (Kinematics Manufacturing)
- [Printed Catalog and Direct Mail Campaign](#) for an Trucking Industry Leader (Rush Truck Centers)
- [Website Redesign and Modern Brand Imaging](#) Website Redesign and Modern Brand Imaging for a Custom Architectural Millwork Manufacturer (Glenn Rieder)

Sometimes getting some help from the experts is the best way to jumpstart your brand building. Let's talk ideas that drive business!

Sherri Oldham

Call us at **713-863-7330** or email us at [**Inquiry@socreatives.com**](mailto:Inquiry@socreatives.com)

Section 01

The Connection Between Robust Sales & Brand Health

What is brand health?

According to Qualtrics, brand health is how a company or brand delivers on promises to customers. The more satisfied customers are with the product or service, the better brand health and the stronger its positioning. Brand health is synonymous with the financial value of your brand. That's because a strong brand leads to increased brand loyalty, delivering higher sales, reduced customer acquisition costs, and greater profitability.

And your accountants and shareholders will love the increased cash flow, which fuels long-term stability and growth.

Why is brand health important?

Let's look at some numbers. Did you know:

- **50% of customers** now expect to see branding consistency across all channels. These include traditional media, digital media (social media, website, email, etc.), marketing, sales, service, and more. Improving brand consistency can **increase revenues by 23%**.
- **63% of sales representatives** say that the health of a company's brand strongly impacts whether they can close a deal. High close rates don't happen on the sales floor alone. They are a product of an amazing sales team selling a great brand.
- Companies with poor brand health pay **10% higher salaries**. It's harder (and more expensive) to attract top talent and keep them when brand health is struggling.
- **Brand recognition goes up 80%** when a brand chooses and uses effective colors in branding.
- **90% of B2B buyers** turn to Google first when they have a problem your company can solve for them. Being seen when they begin their search influences the trajectory of their buying decisions.
- **74% of B2B buyers** do at least ½ of their research online before buying something in-person or over the phone.
- **77% of B2B buyers** believe that B2B companies make buying from them harder than it has to be.
- **71% say a company's social media** brand influences their buying decisions. In fact, **80% of B2B leads** come from LinkedIn.



Signs of Poor Brand Health

One or all of these could be a sign that your brand is in trouble.

- **Growth is hard.** Your efforts to gain market share, cut customer acquisition costs, and shorten the sales cycle are all met with pushback from the market, customers, and even team leadership. Buyers disappear or cleverly ghost all contact attempts.
- **You're losing market share.** If you're an established brand, your phones aren't ringing like they used to. You haven't changed much, but your customers have.
- **Marketing isn't getting results.** Inbound website traffic and inquiries are abysmal. Maybe you can generate a little interest on social media, but the actual signups, conversions, and quote requests are low. Ad costs are breaking your budget. There's just nothing left to invest in higher ROI long-term marketing strategies. You create content because you've heard about the power of inbound marketing. But no one sees or engages with it.
- **It feels like loyalty no longer exists.** Existing customers and accounts will leave for the competitors who dangle a lower price in front of them, making any gains a net loss.
- **Your teams are discouraged.** You may be experiencing workplace trends like quiet-quitting, new hire ghosting, minimal work Monday, or The Great Resignation. Your recruits and hiring costs are up, and productivity is down.

This is a tough place to find yourself. Assessing your brand's health will help you find your way out of this.

S.O. did you know?

74% of disengaged workers were looking for new job opportunities in 2021. (Gallup)

The Importance of Testing Your Brand Health

Whether your company is in start-up mode or mature and established, it's important to check your brand's overall health periodically. Over time, your customers and their needs may start to change; and it's essential to adapt to these changes. By performing a brand health check-up, you can ensure your brand is still effective when it comes to attracting your target audience and delivering on your organization's goals.

A brand health assessment can help you identify what areas of your branding are holding your company back from reaching its true potential.

Bottom line: strong brands know how to communicate their worth to customers and keep their brand promise. You can build this kind of brand through the many components of branding we'll explore in this book:

- Brand Goals
- Understanding the Market
- Your Mission & Vision
- Your Brand Values
- Communicating Mission, Vision, Values, and Voice Through Content
- Managing Brand Misalignment
- How to Keep Your Brand on Track

S.O. did you know?

78% of customers would rather learn about a company through articles than ads. (Zippia, 2023)



Section 02

Setting a Course: Your Mission & Vision Statements

What is your brand trying to accomplish?

Strong companies clearly communicate their brand's mission and vision for the future with employees, customers, vendors, and all stakeholders. You'll communicate these through words, visuals, and in the way you run your business.

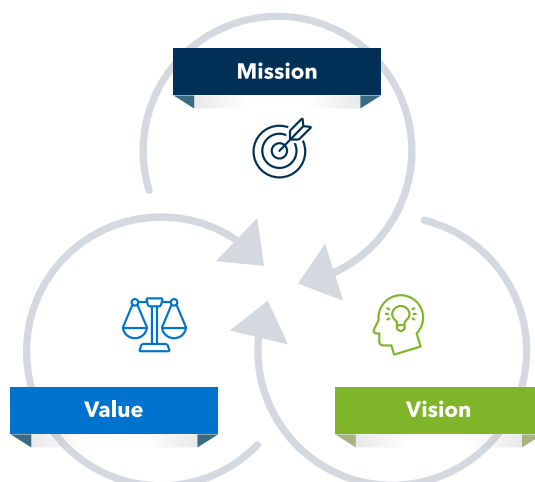
Your mission and vision act as a guide that helps all stakeholders understand what is important to your organization.

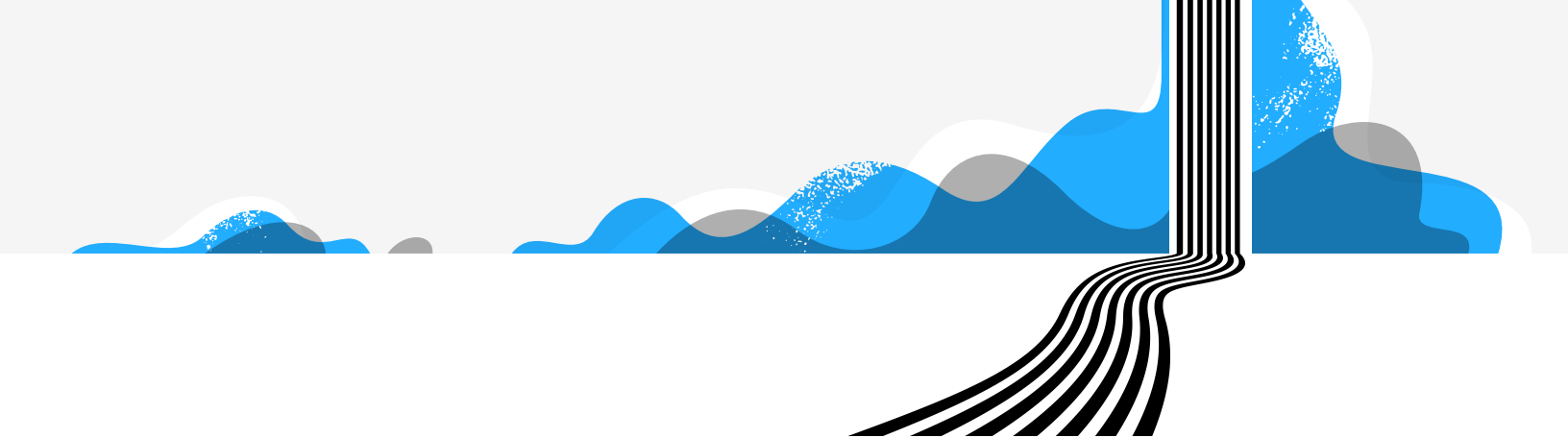
The decisions your company makes every day shapes your brand. Each decision may not seem like much, but these decisions add up to how efficiently you can meet team and company goals. Highly-efficient teams get more done with fewer resources, and they get it done faster.

Mission and vision statements communicate:

- What's important to the company (mission)
- Where the company wants to go (vision)
- How you go about things (values)

The decisions made in the organization at every level are working toward the goal you've established as your reason for existence. Customers experience this as branding consistency.





What is a mission statement?

A mission statement outlines the ultimate goal and the values you will embody to reach that goal. It addresses the “who” and “what” of your company, focusing on what your company does.

Inspiring Mission Statement Examples

Here are some examples to help you craft your own or assess your current mission statements’ alignment with your brand.

- Microsoft: “Our mission is to empower every person and every organization on the planet to achieve more.”
- General Electric: “We rise to the challenge of building a world that works.”

What is a vision statement?

When distinguished from the mission statement, a vision statement is a look toward the future. It focuses on what your organization wants to become in the long term.

Inspiring Vision Statement Examples

- Microsoft: “To help people and businesses throughout the world realize their full potential.”
- General Electric: “to become the world’s premier digital industrial company, transforming industry with software-defined machines and solutions that are connected, responsive and predictive.”

A side-by-side look at a mission and vision statement

On the surface, having a mission and vision statement can seem redundant, so it helps to look at them side-by-side to see why they’re different and serve a unique purpose.

Mission for S.O. Creative: “Our mission is to build powerful connections that foster trust, brand loyalty, and brand expansion by delivering consistently elevated service and an incredible product.”

S.O. did you know?

Nearly **90% of consumers are willing to pay more** for something when it comes from a brand they trust. (Salsify, 2021)

81% of customers make purchasing decisions based on how much they trust a brand. (Forbes, 2021)

Vision for S.O. Creative: “To construct powerful brands and illuminate their path to growth and success.”

You’ll notice that the mission is more grounded in the present. It describes what S.O. Creative’s talented team members do every day and how they do it. On the other hand, building “powerful brands” takes some time, making this the long-term vision.

Aligning personal performance with your mission

This not only helps you build a consistent brand. It generates a culture of highly-engaged employees. Hands down, companies with highly-engaged employees are more profitable, in part because of their ability to effectively communicate the brand’s mission through their actions.

This impact isn’t just a theory. A survey of 2,708,538 employees across 112,312 teams in 54 industries found a 23% profitability difference between companies with highly-engaged employees and those with average to low engagement (Gallup).

Ask the right questions.

It is important to plan your targets and goals strategically. An effective way to direct (or redirect) your company is by seeking the answer to these types of questions:

1. Where are you now, and what is your current situation?
2. How did you get here, and what were the factors and decisions that were made?
3. Where do you want to see your company grow, and what do you want to accomplish?
4. What steps will take you to the ideal future of your business?
5. What obstacles and problems will you need to overcome?
6. What additional resources, skills, and knowledge will be necessary to achieve your strategic objectives?



Section 03

Your Brand Values

What do you value as a brand & how do you show it?

In addition to understanding what your brand is trying to achieve, you'll also need to understand what it is your brand stands for. Research shows that customers are more likely to purchase from brands that share their own values. Values are deeply held beliefs that guide behavior, and are shaped by our culture, beliefs, and experiences.

Your brand values communicate the 'how' you will operate. What behaviors and beliefs matter to your organization, and how do you "leverage" these values to be the "best" at what you do.

What values are important to your business? Some brands value collaboration, communication, and teamwork. Others value internal competition and winning by any means possible. You might pride yourself on being honest and thorough. Or it may be more important for you to be seen as affordable and fun.

When you have a certain value, it also guides your investments. People spend time, money, and mental power on the things they see as important.

In other words, you can't just say "we value collaboration" if you're not investing in the tools and skills that make that possible. That would create inauthenticity, which destroys brands, especially in the days of social media. When building your brand, the best thing you can do is be honest with yourself about how you want to run your company. Align your mindset, time, and monetary investments with those values.

S.O. did you know?

The findings from Ipsos underscore that a customers **brand choices are strongly aligned with their personal values.**

What are the benefits of brand values?

Your brand's values become your brand's culture, and impact both productivity and job satisfaction.

Values help you connect with the target market. You will be able to attract new customers, improve brand experience, build a strong customer loyalty base, and develop competitive advantages.

Communicating Your Values

Brand values should be accessible to internal and external parties. These values become a part of your brand's message and influence how both company recruits and customers see your company. Train and coach leaders who can reinforce these values throughout the organization. Your values become part of team meetings, performance reviews, and daily communications across the company. They're not just spoken; they're lived.

Creating Your Values

What values do you want associated with your brand? These might be words your customers already use to describe your brand, or words you wish they would use. Choose three to five values that are the most important to your brand overall.

S.O. did you know?

88% of consumers say authenticity is important when deciding what brands they like and support. (Stackla, 2021)

46% of surveyed customers say they **would pay more for brands they trust.** (Salsify, 2022)



Section 04

Understanding Your Market: Your Competition

What does the competition look like?

If you want to be competitive in today's busy business world, you've got to know your competitors and what they are doing to serve your target market. Ask yourself, how do you go up against the competition? If you can't set yourself apart, you won't gain or retain market share. To differentiate, you must first see what the competition is doing. Chances are they're doing some things very well.

We use a 4-pronged system to analyze the competition that includes developing a data-informed:

- Competitor Overview
- Competitor Analysis
- Market Summary
- SWOT Analysis

Start With a Competitor Overview

This basic document outlines common qualities of your top 5-20 competitors, depending on your industry. It's a simple way to start thinking about how your company fundamentally differs from other companies without diving deep into any one company.

Even at this high overview level, you may see competitors' weaknesses or "blind spots" in who they're reaching and how they relate to customers. These present opportunities to learn what works well and what you can do in another way to set your brand apart with a message that compels some of these competitors' customers to switch to you.



- 1 Who are your self-identified competitors?**
- 2 Who are online prominent and up close competitors?**
- 3 How do your competitors and brands use digital channels to attract customers?**

This is where a lot of marketing professionals can get it wrong. They try to focus on people who have just become aware of a business need. But these aren't your most likely customers.

Those who are already with someone else have already proven they're ready to buy.

Your competitor overview document outlines your top competitors' by gathering their:

- Names
- Offerings
- Prices (if fully custom, how do they go about it)
- Audience
- Position in the marketplace

After you get to know your competitors, you'll be able to understand better where you stand in the marketplace. Understanding your strengths, weaknesses, opportunities, and threats will help you improve your brand while working proactively to combat any potential issues that may arise.

You'll be referring to this document quarterly, annually, and anytime you notice a shift in market responsiveness.

Create a Competitor Analysis

Choose at least three of your top competitors. Research them, follow them on social media, subscribe to their newsletters, and click on their ads (which you'll probably start seeing after you follow them). We also use advanced competitor spying tools to gain an even deeper understanding of their marketing strategy, something that wouldn't be possible through manual means alone.

This research will allow you to get to know them and glean insights you can use to define and refine your brand position.

Just like your brand, other companies periodically review and update their positioning and branding. You may not be able to perform a complete competitor analysis every quarter but do adjust this document periodically.

Ensure you are up-to-date with other brands in your industry that serve your market segment.

It's important to realize that an online competitor may not do exactly what you do. Instead, they directly compete for your target audience's time, attention, and money. These will be companies that share common words and phrases or audiences that have either been self-identified or researched.

Build a Market Summary

A market summary is a concise overview of the current state and trends in your industry or market segment. Once you've completed your competitor analysis, some interesting findings will come to light. Your market summary will express how you can use these insights to build a resonating brand that feels fully differentiated from the competition.

In your market summary, you'll outline:

- **Size, value, and potential of your target market.** What is your market competition or market size? Knowing these numbers can be helpful with strategic media strategy planning. They can also be helpful when trying to gather ROI predictions.
- **Needs, preferences, and behaviors** of your customers (summarize your buyer personas)
- **Specific ways you'll differentiate** from the competition you've identified
- **Opportunities and challenges** in your industry
- **Threats** you'll need to stay aware of and proactively plan for
- **Strategies** to reach and serve your customers

Then over the longer term, this summary should address the following:

- **How you'll reduce the risks and costs** of launching a new product or service
- **How you'll increase your return on investment (ROI)** by optimizing your marketing efforts
- **What you need to track in order to monitor** your performance and adjust your plan as needed (KPIs)
- **Tools, technologies, and skills** you'll need to invest in over the next few years to compete in this market

Visualize With a SWOT Analysis

A SWOT analysis is a common tool to examine your company's strengths and weaknesses (internal factors) and opportunities and threats (external factors). It's important to acknowledge what you're doing well and in what areas you can improve for the future.

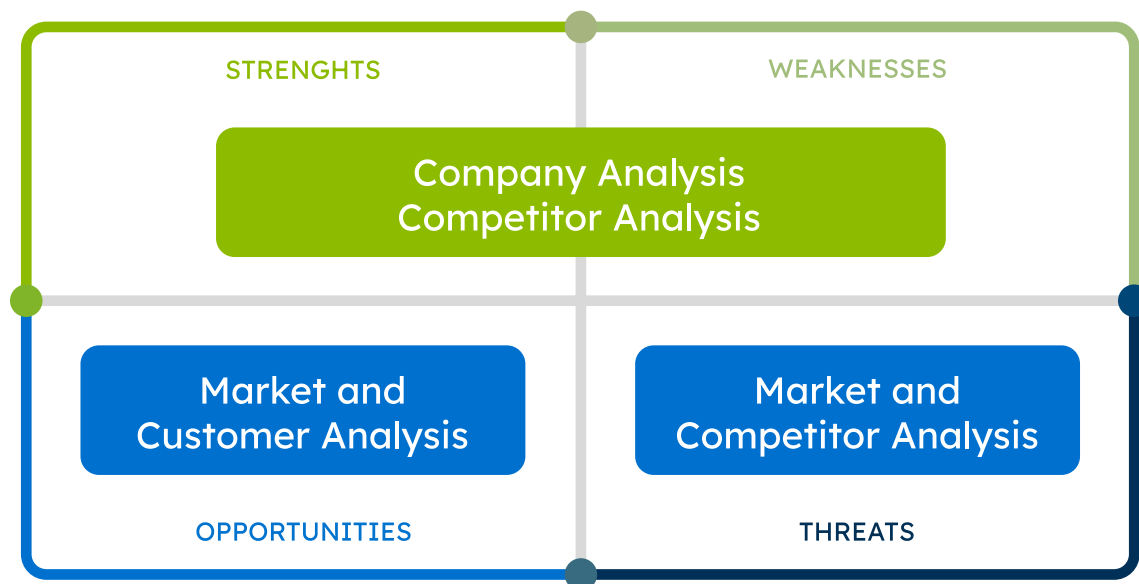
To build your own SWOT Analysis, start with simple lists.

1. **List your strengths.** What gives your company an advantage? What makes it unique? Examples include skills, experience, and reputation.
2. **List your weaknesses.** What limits your company's potential? What puts it at a disadvantage? Examples include limited resources or location.
3. **List your opportunities.** These are the external factors that could create favorable conditions for your company? New possibilities? Examples include market trends, customer needs, and competitor's weaknesses.
4. **List your threats.** What factors could harm your company, or pose risks and challenges? Examples include market changes, customer complaints, and competitors.

Once you have listed all these elements, you can use them to create a swot matrix like this:

The swot matrix helps you visualize and compare the different aspects of your situation. You can use this visual to see how these 4 impact each other while identifying and prioritizing your goals and actions.

Through these customer and competitor analyses, you now have a clearer view of the market in which your company exists and how you can distinguish yourself in it, working toward your strengths to grow your company.



Section 05

Understanding Your Market: Your Customers

Who are your ideal customers?

The success level of any business hinges on its ability to identify the ideal customer. You need to know who is buying your product and services, their needs, goals, pain points, and how they make decisions.

A buyer persona is a tool that gives insight into your client. It goes beyond demographic information and seeks out psychographic information. Age, gender and location all fall under the demographic umbrella, whereas psychographics captures people's interests, activities, and opinions. Where do they get their information, and who do they trust? Learning more about these creates a deeper understanding of your ideal customer.

After creating the personas, you can compare the information to your brand values to determine how you will resonate with this target audience. Because at the end of the day, the better you resonate with your audience, the more connected they feel to your brand and the solutions you provide. That bond generates engagement, loyalty, brand ambassador activity (word-of-mouth) and increased customer lifetime value.

Bottom line: You're attracting the right people with the right message.

What do they value and look for in brands they do business with? Successful brands know these categories of a buyer's persona because they have analyzed data from marketing/sales, customer care, competitors, and more to build a data-informed picture of this ideal customer.

We recommend five personas maximum. Most companies start with one or two and build out from there. Here's why.

Having a small number helps you focus your activities and achieve the best ROI. You may have very different customers, but you also have ideal customers. These are the ones who are naturally attracted to what you have to say. They often buy faster, spend more, stay with you, and provide your company with valuable feedback you can use to improve your branding and product.

S.O. did you know?

Vilfredo Pareto's 80/20 principle states that for many outcomes, roughly 80% of consequences come from 20% of causes. By **studying the top 20% of your customers**, you can work out how to attract similar people and increase your future profits. (Investopedia, 2021)

Focusing here builds a firm foundation on which to build, expand, and grow. All of this will impact brand and marketing strategy, and aid in strategic planning.

Create the Buyer Persona

To create the buyer persona, start by finding a picture or image of a person you could imagine as your ideal customer.

Move forward by building out the persona with demographics, psychographics, and some behavioral traits.

It's important to start with the data when putting this together. What is the most common job title your sales team is selling to? How many years have they been in this role? These are likely to be the smartest choices to assign your new brand persona.

As the persona represents a buyer, list out real potential challenges and goals. What solutions do you offer that directly address these problems? Your brand message will revolve around the intersection between these problems and how you fix them.

Find out where your personas go to learn about problems and solutions. They can also learn on social media, trusted online publications, review sites, and traditional media. Reaching this person will require your brand to build a presence in these places.





Resonate With This Audience

Now that your company has hammered out crucial information and created target market profiles and buyer personas, it is time to see how well your target segments receive your content. Regardless of the format, it is essential to produce information and content deemed important and valuable by your target market profiles. So, if that's not happening, you're not connecting.

Taking time to track performance, measure, and test to further refine how you relate to this persona will be a valuable source of information.

Understanding your customers is paramount, but it's critical to realize that they exist in a marketplace filled with marketing messages from your competitors, so next, it's time to look at the market from a different perspective—that of your competition.

Section 06

Bringing Your Mission, Vision and Values to Life Through Branding

How do you communicate your mission, vision, and values?

An established mission, vision, and values are communicated through branding to both internal and external audiences.

Consistency is key. “The 3 Cs of customer satisfaction” are “consistency, consistency, and consistency (McKinsey & Company).” We tend to agree.

Consistency repeatedly exposes your target audience to the same colors, logo, messages, words, and overall brand experience to help create a solid positioning in the consumer’s mind. This, in turn, solidifies brand recognition and assists in unaided awareness of your brand.

Consistently communicate through these 2 documents:

- Brand style guide
- Brand messaging guidelines

Create a Brand Style Guide

The brand style guide is a document that details any information about the visual elements of your brand:

- **Logo.** A logo should be easy to remember and simple enough you could draw it by hand.
- **Colors.** People don’t just see colors. They feel them. So it’s important to understand color psychology. For example, blue is often associated with honesty and integrity. This color is used in various shades by banks, financial advisors, accounting firms, and healthcare companies in B2B and B2C. In each case, the company tries to say without words, “we value honesty. You can trust us.” Colors can also be used together to send a message they might not send individually. For example, Google, Microsoft, and eBay all use a mix of 4 basic colors (red, blue, green, yellow) to communicate, “We’re essential to life and business.”

S.O. did you know?

68% report brand consistency has contributed from 10% to more than 20% of their revenue growth. (Lucidpress)

S.O. did you know?

Consistently using one color palette on your logo, products, digital content, and promotional material can **drive your brand recognition up by as much as 80%**. (Forbes)



- **Imagery.** People can compute an image in milliseconds compared to a slogan, which takes a second or two. Like colors, imagery generates emotion and communicates who you are. Think about it for a moment. How do you feel when you see smiling customers on a website? Helpful employees? Large buildings? Lit-up servers? Or machinery? These elementary images evoke a particular emotion and communicate what a brand values.
- **Fonts.** On a subconscious level, people remember fonts and associate them with a brand. Envision the fonts of IBM, GE, and RCA. Imagine these companies using a comic book font. It wouldn't be the same.

Refer to this document when creating any visual content for your brand. These are all features that your company will need to maintain brand consistency.

Formulate Your Brand Messaging Guidelines

These guidelines will detail how your brand portrays itself through written communication and visual images, used for both internal and external communication. It's crucial that these are relevant to the target audience and different audiences you seek to reach.

S.O. did you know?

85% of organizations have brand guidelines. (Lucidpress)

77% of B2B marketers say **branding is crucial for growth.** (Circe Research)



This document guides with examples for your:

- **Voice.** Your voice is how you relate to customers. A well-defined voice becomes the personality of your brand, and customers are more likely to do business with a company they relate to. If your brand voice and personality are characteristic of a rugged blue collar man, the services you offer may be in the oil and gas or industrial sectors.
- **Tone.** This is how you adapt your voice to different situations. Sometimes it's time to be serious and get to the point. Other times, things are more relaxed and experiential.
- **Slogan and catchphrases.** The great thing about having a handful of catchphrases in addition to a slogan is that you can sprinkle them throughout your content to consistently reinforce your message without having to rely solely on your slogan.

In short, brand messaging is how your brand speaks, and the messages it conveys. It's streamlined communication about your business, informed by strategy to convey your unique value proposition (your brand promise) to your target audience. (Asana)

User Experience and Design Guide

UX and design are vital brand communicators. The experience you provide should speak to what you value. These include elements like navigation, forms, downloads, contact, checkout, returns, widgets, clickable images, accessibility features, and demos. If you say you value customer experience and want to build trusting relationships, but your website is slow, unresponsive, and lacks the standard features customers expect in your industry, you're not being consistent.

Section 07

Knowing When It's Time to Rebrand

What is rebranding?

Rebranding is changing the look and feel of your company, it's a process many companies undergo in an effort to evolve. It involves reevaluating your colors, images, typography, voice, tone, user experience, and customer experience to ensure you send both the right message and a consistent one across traditional and digital media.

Why rebrand?

There are a multitude of reasons why it may be in the best interest of your company to rebrand:

1. Brand Performance Issues

Your company is struggling not meeting revenue projections. You have elevated customer acquisition costs and no customer loyalty.

High employee turnover and low morale are killing productivity and it's making it harder and harder to find and retain the skilled professionals you need to perform.

2. Mergers, Acquisitions, and Spin-Offs

You're no longer the company you were. Both customers and employees are unsure where they stand with you and what to expect going forward. Can they anticipate the same experience they received from the "old company"? Will it be better or worse? In B2B especially, if you don't quickly establish a new identity with existing customers they will start shopping around.

3. Changes in Ownership

Maybe you don't agree with the way the previous owner was running the company. You want to do things differently. Change is hard on employees and customers, so it's important to have a plan and make changes in the least painful way possible.

When it comes to change, there's the fast way, and there's the slow and agonizing way. In other words, it's better to rebrand all at once, so you can start consistently communicating your new branding to customers and employees.

S.O. did you know?

74% of the S&P 100 companies have rebranded their business in the first seven years. (Landor & Fitch)

4. Repositioning

Repositioning may be called for if the market has changed and you haven't evolved with it. It's time to re-establish your brand promise and start delivering the experience.

5. Internationalization

Internationalization is the need to recreate an image and look that can be used across all countries, removing the need to sell under different names to different places based on what is appropriate for the culture.

Before you take this leap, you must anticipate how cultural differences may impact how someone in another country sees your brand. For example, in the U.S., red often represents honor, patriotism, and love. In many Asian countries, red symbolizes luck, celebrations, and gifting. When red is combined with certain symbols or imagery, however, it can also represent communism. So, it's crucial to evaluate branding as a whole.

6. Changing markets

As you grow and expand, you find that various market sectors need other things. They don't all respond to the same brand promise or messaging. But you don't want to try to be something different for each one. You are still one brand. You need to rebrand to unify across channels and sectors. For example, many companies are in the midst of a digital transformation as society requires them to reinvent what they have in real life online to stay current and relevant across generations.

7. Bad Reputation

A brand image has been marred by an event caused by outside forces or the company itself. There may be no coming back from this. The only way forward is to reinvent your brand.

8. Stakeholder Conflict

The new brand may be too similar to an existing brand, or you have differing opinions about identity changes and branding in general. It may be time to bring in a third party who can research, analyze, and provide objective data-informed branding strategy insights that help you escape the conflict for the health and future of the company.

9. New CEO

Every new leader brings a leadership style and ideas for growing market share. It's why you chose a new CEO in the first place. It's important to embrace new leadership and create an environment where they can lead effectively. Often, this requires rebranding.

10. Outdated image

Let's face it. Your general demographic may not change, but the people in that demographic do. We all get older. What may have once appealed to business owners aged 35-55, may not to the next generation reaching that age. If this is your target, you must modernize your brand to continue reaching this group.

Rebranding Examples

Let's look at some real companies that decided it was time to rebrand and how these went about it.

Rebrand of Schlumberger to SLB

Schlumberger has been around for nearly 100 years. It is the world's largest oilfield services provider and equipment, including drilling and subsurface analysis.

In 2022, the company decided to rebrand itself with a new name, logo, and color scheme. The company has decided to "shed old line products and recast itself as a digital services provider and supporter of cleaner energies." (Reuters)

This is an effort to show a new side of the company and the ambitions and goals of focusing on a greener, lower-carbon, and clean energy future.

Schlumberger



Rebrand of Ryder Trucks

Ryder System, Inc., or Ryder, is an American-based provider of transportation and supply chain management products including a large fleet of rental trucks. In 1996, Ryder sold its familiar yellow "one-way" consumer rental business and rebranded its fleet with a new logo and new colors to focus on commercial customers.

This came in response to the tragic Oklahoma City bombing massacre of 1995. A yellow Ryder truck was the vehicle in which a powerful bomb was placed and then exploded; killing 168 people, 19 of them children. Hundreds of people were injured in the blast, and the devastating event has been labeled as the worst domestic terror act in the history of the United States.

Unfortunately for the Ryder company, this created a terrible visual connection for the well-known yellow truck. To distance the company from the crisis, they decided to rebrand to deter adverse or declining sales.

Following the successful change, Ryder remains a strong company, an industry leader, and is on the Fortune 500 list.



Section 08

Communicating Your Brand Through Effective Content

Is your branding on target?

“A content audit describes the process of collecting and analyzing assets on a website, such as landing pages or blog posts. Content audits keep an inventory of a website and provide insight into which content to create, update, re-write, or delete.” HubSpot

Now that your company has its direction and knows who it is targeting, it's time to test how your target audience is receiving your content through a content audit.

Benefits of a Content Audit

Ultimately, your content audit helps you make sure you're getting the most out of your marketing budget to get the highest possible ROI on your content investment, both organic and paid.

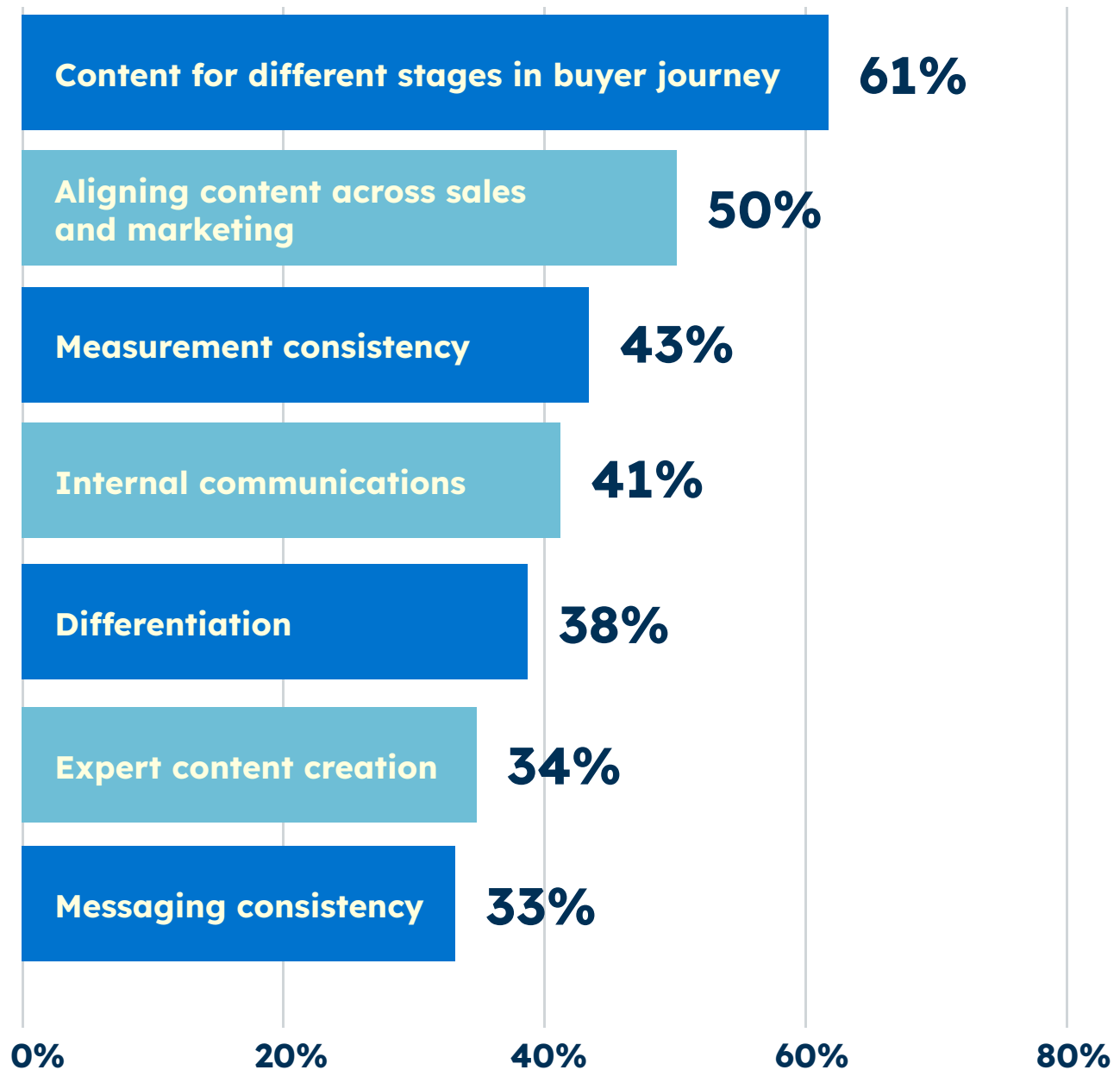
A content audit:

- Collects and analyzes objective information about how your target interacts with your content.
- Gleans data-driven insights into the performance of your content.
- Helps you make informed decisions based on factual information rather than assumptions.
- Identifies low-hanging fruit. These are areas where you can improve performance dramatically by making some small improvements rather than starting over from scratch. For example, you may have good content. Repurposing, optimizing, editing, or updating could make it an even more valuable asset to your brand.
- Uses A/B split testing, heat mapping, and other analytics to identify pieces of content that perform best.
- Helps you understand more about what your audience likes and dislikes.
- Assists in figuring out where your audience wants to engage with your content.

S.O. did you know?

Almost **60% of marketers reuse content** two to five times. They generate “snackable” content based on assets. (LookBookHQ)

B2B Content Marketing Challenges



Content Marketing Institute/MarketingProfs

Base: Content marketers who measure content performance.

Aided list; multiple responses permitted.

13 Annual Content Marketing Survey:

Content Marketing Institute/MarketingProfs, July 2022†

Content maintenance becomes easier when you have an understanding of what you're offering. Look at how your content fits together, keeping your users' goals in mind. Assess whether these journeys are complete and useful. Note where you can make improvements through linking items together (through titles, links or cross-references) or adding new content. (Qualtrics)

It's important to periodically perform content audits. They keep you relevant and up-to-date by understanding what you have been doing and how to figure out the next step going forward.

When to Audit

A content audit should always occur when you're rebranding or deciding to move in a different direction. This is critical because you may have content communicating outdated messages you need to eliminate to own a new brand.

You should also take inventory of your content assets and performance, at least quarterly, to see if you need to make a big change or stay the course. This allows you to identify new opportunities, and stop wasting time and money on content that's doing nothing for you.

Additionally, it's vital to set up a "real-time audit" where you regularly track your content's performance, learn what works, and continually improve.

Performing a Content Audit: Traditional Advertising

It's pretty difficult to imagine going a day without seeing a commercial on TV, noticing a billboard on your way to work, or finding an advertisement in your mailbox. These are the most well-known and recognized forms of advertising. It may not be en vogue. But we do see traditional advertising every day, and it impacts our decision-making both as individuals and as business decision-makers. The same is true for your customers.

Traditional ads refer to offline advertising we've all grown up with—TV, radio, newspapers, flyers, mailers, billboards, in-person events, etc. One could argue that ads on streaming services are also traditional even though they're online because streaming has just replaced the TV in many households. So, there are gray areas here.

A 2022 article in the Harvard Business Review states that marketers are returning to traditional advertising. Not long ago, analysts predicted that Print, TV, and radio would become nearly obsolete in the face of digital marketing. However, it is rising for the first time in over 10 years.

That's because, after several years of hearing how we need to get with the program and switch to digital, people are starting to realize that traditional still works. It works very well when done correctly. This is especially true in B2B, where it's easier to know where to reach your target audience.

The traditional advertising industry is still strong and continues to help grow new businesses. It both reaches your audience on its own and complements your digital advertising efforts, becoming stronger together.

You could currently have two different teams or companies handling your traditional and digital content. This is a mistake if they're not working very closely with each other. It's vital to assess your traditional and digital content during a content audit to ensure you're communicating a consistent message across ALL channels. To this end, your traditional content audit should look at your content as a stand-alone and how it works with your digital strategy.

Let's look at some traditional content assets that should be part of your content audit.

Print

This includes advertisements in newspapers, newsletters, magazines, brochures, and other printed material for distribution. Here are some interesting print statistics to guide your audit:

- Ad spending in the Print Advertising segment will reach \$12.37 billion dollars in 2022. (Statista)
- The largest segment is Magazine Advertising with a market volume of \$6.34 billion dollars in 2022. (Statista)
- In the Print Advertising segment, the number of readers will reach 51.4 million users by 2027. (Statista)

Broadcast

This includes radio and television commercials, as well as specialized forms like on-screen movie theater advertising. Here are some numbers you need to know:

- It is expected that TV advertising revenue in the United States will grow from \$72.3 billion dollars in 2021 to \$81 billion dollars in 2025. (Statista)
- In 2022, more than 90 percent of radio station ad revenue in the United States was generated over-the-air. (Statista)
- In 2022, local online ad revenue generated by U.S. radio stations will reach \$1.8 billion, having surpassed the one-billion-dollar mark already in 2019. (Statista)

Direct Mail

These are your fliers, postcards, brochures, letters, catalogs, and other materials printed and mailed directly to consumers. Is “snail mail” still an effective way to reach people? Just take a look!

- In 2022, a survey among enterprise marketing leaders in the United States found that they relied on direct mail for multiple marketing purposes.
- The most used case was promoting brands and/or services to already existing customers, named by 29 percent of respondents. Acquiring new customers came out second, with 27 percent. (Statista)
- In 2022, direct mail marketing spending was forecast to amount to \$43.3 billion, compared to the value of \$41.9 billion reported in 2020. (Statista)

S.O. did you know?

“92% of consumers are **driven to online activity because of direct mail.**” (USPS Report)

Telemarketing

Yes. Cold-calling is still relevant and practical. Telemarketing includes any use of the telephone to engage prospects or existing leads.

- 82% of buyers accept meetings with sellers who proactively reach out. (RAIN Group)
- 41.2% of sales professionals believe that their phone is their most effective tool for the job. (Sales Insights Lab, 2020)
- Organizations that believed that cold-calling is no longer effective experienced 42% less growth than those who thought otherwise. (Medina, Altschuler, and Kosoglow)

Performing a Content Audit: Digital Presence

Digital marketing channels are delivery methods of communication via many online platforms and programs. You can increase reach, brand awareness, and more through digital channels. These allow you to produce and create content for different audiences and target markets.

One of the great benefits of digital marketing is your ability to get instant customer feedback. You can track online engagement and know who’s responding in ways you just can’t with traditional means. Doing so can provide key insights you can use across your traditional and digital platforms to improve performance. Here are the main channels you’ll need to build an online presence, and including these in your audit is important.

Your Website

Everything you do online leads back to your website, which is by far the most vital piece of your digital strategy. While technically not “content,” this is where your content is housed. If your content comes from a broken home, you’re already setting it up for failure. So, as part of your content audit, let’s assess the website. Is it fast, mobile-friendly, easy-to-navigate, and responsive?

SEO (Search Engine Optimization)

Search engine optimization starts with a fast and responsive website. But in terms of your content audit, make sure you’re effectively targeting the searches through the right keywords that will lead your target audience to your website, and identifying any gaps in your SEO strategy.

Email Marketing

Email marketing is a highly effective way to nurture leads and increase the customer lifetime value of repeat customers. In fact, when done correctly, it has the highest ROI of any marketing method, around \$38 for every \$1 spent.

Is your email resonating with your audience? Have you perfected timing and segmentation? Do you have the right balance of information and sales? A content audit can shed light on how to achieve the high email ROI you’re capable of.

Video Marketing

Once on the fringes of digital marketing, video is now essential. Because video creation has become a lot easier for the average person, everyone is creating videos. Still, creating a quality video is more costly than most other forms of digital content so it’s important to evaluate how your video assets are performing.

PPC (Price-Per-Click)

Pay-per-click campaigns are unique because the ad platforms punish you for low-performing ads by raising how much you have to pay per click. Eventually, it will become so expensive that you stop advertising there. They don’t want to show people bad ad content. It’s not good for their platforms. This is how they weed out companies who deliver a bad ad experience. Many companies don’t realize this and keep paying exorbitant ad costs.

So, if you think your ad rates are outrageous, know that you may be paying way more than your competitor for the same ad space. The platform may be trying to force you out because you’re not using an effective ad strategy with high-converting landing pages. An audit can help you determine if you’ve fallen into this trap, so you can get back on track and pay a reasonable click cost.

S.O. did you know?

97% of B2B buyers expect vendor websites to have content relevant to their company, and 96% consider it important for vendor websites to directly address industry needs and demonstrate expertise. (DemandBase, 2020)

S.O. did you know?

Short-form video offers marketers the highest ROI of any social media marketing strategy. (Sprout Social, 2023)

Social Media Marketing

Social media marketing includes organic business profile building and paid social media advertising. Like pay-per-click, these platforms reward performance. They bury posts and profiles that don't have an effective social media content strategy. And yes, they also make you pay more for the same ad space as your competitors.

Affiliate Marketing

Affiliate campaigns recruit other websites, online publishers, and individuals to share a link to your website in exchange for a small "finder's fee". You'll often find affiliate links on websites that compare services, so you may find your brand on the same page as a competitor. That's okay. Affiliates are incentivized to create content around your link, drive traffic, and encourage people to click it. This is an underutilized and cost-effective way to expand your online reach quickly. Amazon, Google Ads, and Facebook all have affiliate programs. When they talk about their "partner websites", this is often what they're referring to.

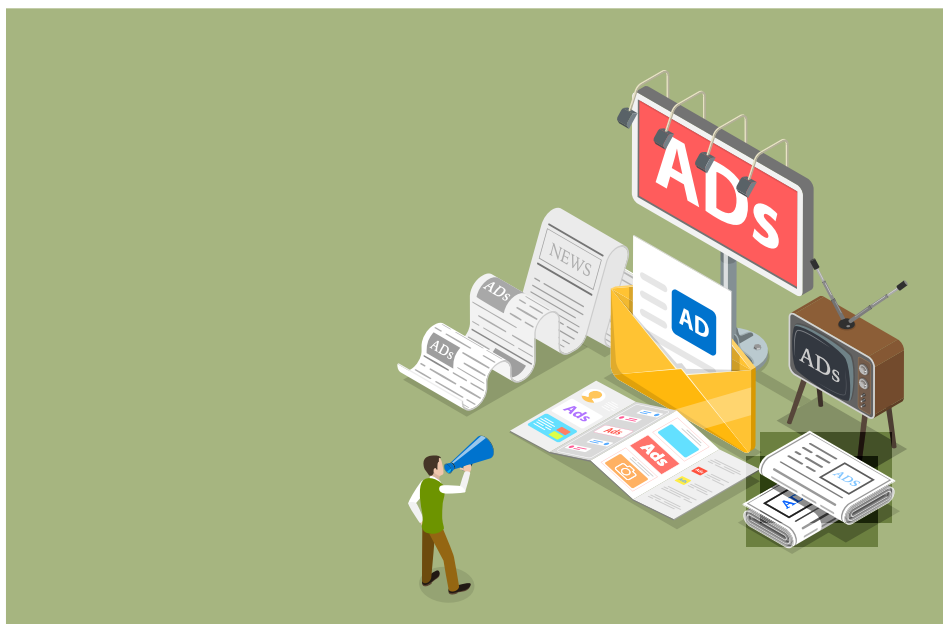
Influencer Marketing

Influencer marketing is like affiliate marketing in overdrive. It's important to realize that influencers are business people, and they've built an audience by resonating with their audience. When they share your brand, they must do it in their own way. Otherwise, it will seem inauthentic and not achieve the results you're looking for.

During a content audit, we can assess whether you're connecting influencers that align well with your brand and whether you're getting the most bang for your influencer marketing buck.

S.O. did you know?

The social media advertising market will reach **\$207.10 billion** in 2023, with a 4.53% projected annual growth rate, leading to \$247.30 billion by 2027. (Statista)



Section 09

Leveraging Marketing Automation to Maximize Branding ROI

Are you capturing the perfect moment?

When you think of content you probably think about the actual words and images on a page. But timing is everything! We've all fallen victim to saying the right thing at the wrong time. So, when people see content is as important as what they're seeing.

You can leverage an automation software platform and analytics to perfect this timing while reducing tedious tasks so your team can focus on the creative side of their jobs they're more likely to enjoy. These platforms streamline sales engagement processes to generate more leads, convert those leads to sales, and optimize ROI.

We can almost guarantee that your competitors are doing this. Given the plethora of moving pieces involved in digital marketing today, it's nearly impossible to effectively manage a digital presence without automation.

S.O. did you know?

77% of marketers using marketing automation tools reported an increase in conversions. (Invesp, 2023)

Benefits of Automation

1. Reduced Cost
2. Additional Revenue and Increased ROI
3. Generates and Nurtures Leads
4. A Refined Marketing Process
5. Personalized Customer Journey
6. Ability to Save Time
7. A More Consistent Customer Experience

Are you capturing the perfect moment?

Email Automation

Email marketing automation is an email, or a sequence of emails sent after a subscriber takes a specific action, like signing up to an email list, making a purchase, or clicking a link. It helps keep the customer engaged with dynamic content suited to their preferences, thus increasing the chances of the email being opened, read, and interacted with.

Sales Hand-Off Automation

Email automation combined with lead-scoring automation can assess when a lead is sales-ready based on a scoring system you establish. It will automatically assign that lead to a sales rep in order to take the next steps in the sales process.

Social Media Automation

You can schedule a month's worth of social media posts and even use a program that can schedule posts across platforms to save you time. You can also use social media automation to track relevant social media trends and cleverly, yet respectfully, interject your brand into conversations to reach new audiences.

Dynamic Content Automation

It is imperative for businesses to “achieve relevance by bridging the interplay between these life forces and their customers’ everyday decisions. And they maintain that relevance by perpetually evolving their products, marketing, sales, and service experiences as life continues to shift.” (Harvard Business Review)

Companies risk becoming ossified without the adjustments necessary to stay relevant. And in our fast-paced world, automation can help you adapt not just over time but moment to moment and person to person.

Dynamic content is a type of content personalization that is fluid and will change to suit the person seeing it. So, people see different types of content and content messages at various times. Your automation software determines what to show this person based on demographics, behavior, and stated preferences.

You're probably very familiar with this when you're doing any kind of online searching or shopping. The ads many sites show are hand-picked based on what you've been clicking on and how you interact with the website.

S.O. did you know?

By 2024, Gartner predicts that **69% of daily management tasks will be completely automated.**

S.O. did you know?

33% of customers will leave if the brand lacks personalization. (Nextiva, 2021)

Section 10

Keeping Your Brand On Track With The Right Metrics

Why is brand tracking essential?

Brand tracking is essential for companies that want to stay ahead of the competition, meet their customer's unique needs, and contextualize brand strengths and weaknesses to adjust brand strategy (Hanover Research).

Tracking your brand's health over time alerts you to changing winds sooner when it's easier to veer one way or the other versus having to completely change course completely—and incur all the costs (in both money and morale) of doing so.

Just as important as brand tracking is, knowing which metrics matter is vital. In the days of viral videos and social media trends, it's easy to feel overwhelmed by the fast pace of changing consumer sentiment. Tracking the right metrics helps you stay centered and objective so your brand doesn't get tossed about in the storm.

The metrics that matter help you identify the KPIs you need to track. These directly correlate to brand success and will quickly tell you if what you're doing for your brand is helping or hurting, reducing budget waste on initiatives that don't work, and progressively improving your brand's health.

Metrics That Matter

Awareness

Before a buyer researches and reads reviews about the great services you offer, they must first be aware your company exists. This all starts with brand awareness.

This is the most commonly used metric when referring to brand performance. It reflects the consumer's ability to recall or recognize your business based on name and logos, and will improve both aided and unaided awareness. This also helps track familiarity and relevance.

All we need to see is the multicolored “G” or the chrome logo, and we recognize Google immediately. When most people see that “G” on a product, it establishes

S.O. did you know?

1 in 3 customers will leave a brand they love after just one bad experience. (PwC)

59% of clients prefer to buy new products from the brands they trust. (Invesp)

instant trust. You know this is a Google product. If you already know and trust Google, you're more likely to try this new product. This is the power of a brand.

Brand awareness seems abstract, but it can be objectively measured online through social listening. Social listening software scours social platforms, news sites, and the Internet in general for mentions of your:

- Brand name
- Branded terms
- Branded hashtags

Additionally, a rise in these trackable metrics indicates that people are becoming aware of your brand's existence and developing some affinity for it.

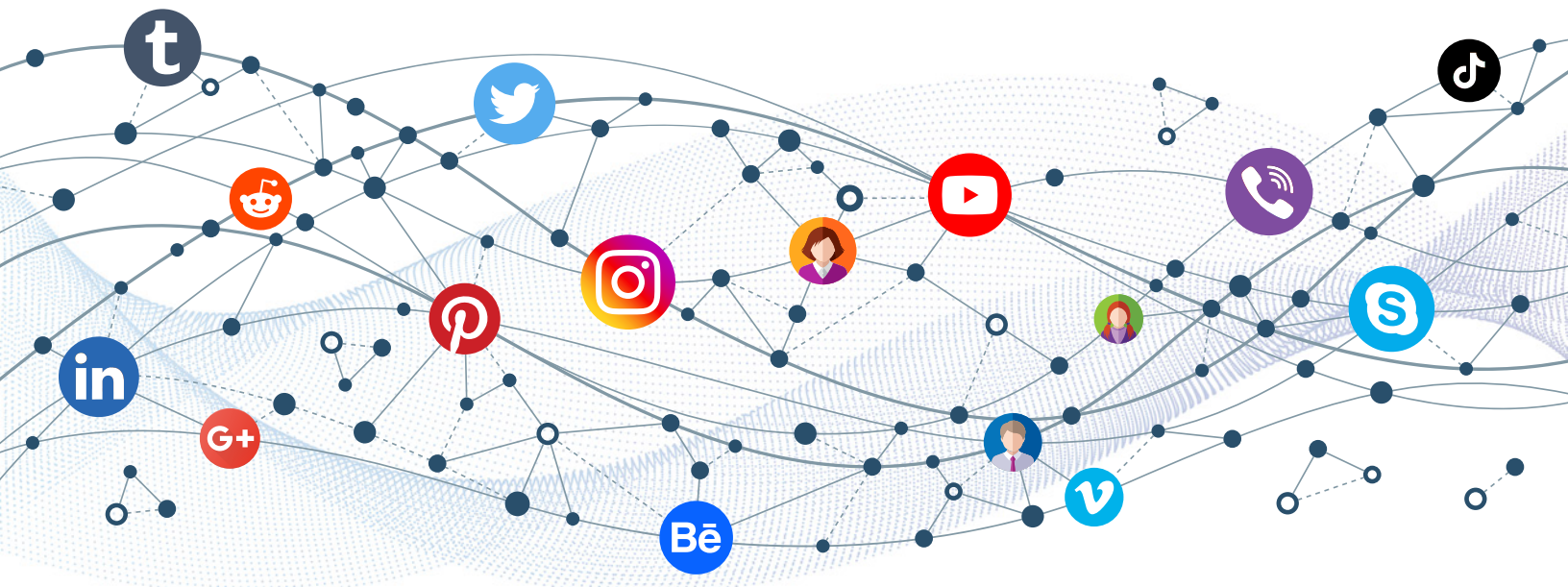
- Social share of voice (how often you're mentioned in relation to your competition)
- Earned media coverage (how much journalists, influencers, etc. reach out because they want to get a quote or tell your story)
- Earned business partnerships (how often non-competitor businesses including influencers want to partner with you for mutual gain)
- Earned backlinks (when someone else chooses to link something they publish online to your website)
- Increased organic website traffic

Additionally, a rise in these trackable metrics indicates that people are becoming aware of your brand's existence and developing some affinity for it.

Impression

This metric reveals the number of times your ads are being viewed online and quantifies the ad displays, thus measuring the opportunity to influence potential customers.

Ad platforms track impressions for you, so this is an easy metric to capture and review over time.



Customer Perception

This is a crucial factor in the success of your company. Is the sentiment toward your company generally positive or negative? If people are against your company due to poor reputation or mistrust, it will affect all key performance indicators (KPIs) and metrics. Congruence with customer perception and conversion/sales is a crucial variable.

Social media platforms can help you track the sentiment around your mentions through artificial intelligence that looks at the words, images, and emojis being presented with your brand name.

The general sentiment of news stories and online reviews also tells how people feel about your brand. Knowledge is power here. When you know, you can do something about it.

With that said, you can't make all the people happy all of the time. That's not the goal.

You care most about the sentiment of your target audience, so it's vital to analyze who's talking bad about you and how that impacts the bottom line.

Let's look at an example for a moment.

Imagine you're a big oil company. Chances are you won't hear good things from the environmentalist community. You don't expect to, and they're not your target audience.

That doesn't mean you can't take steps to become a more eco-sustainable brand, but you already know anything you do will probably not please this audience. And that's okay. Stay true to who you are and what your target audience wants.

But don't fall into the trap of thinking your target audience's preferences can't change over time. That's why you need to be tracking and analyzing this metric.

Preference

Preference is an item or company that people most favor. Do you like Apple or Android? Quickbooks or NetSuite? Trello or Monday.com?

Most of the time, there is no hesitation; we have made up our minds and consistently reach out for the same thing time and time again, almost like muscle memory.

The goal is to position your own brand as the first choice consistently. You want your brand to be the one your target audience habitually turns to when they need what you offer. Studying data allows us to make your brand the preference among your target audience.

S.O. did you know?

70% of small businesses*

invest in social media advertising.
(Visual Objects Small Business Review, 2022)

*A small business is defined by a firm revenue from \$1 million to over \$40 million and has from 100 to over 1,500 employees. (Census.gov)

In terms of tracking this metric over time, you know that you've become the preference when you see these numbers on the rise.

- Promoter activity
- Repeat customers
- Increasing length of customer relationships
- Increased customer lifetime value
- Increased profits

Loyalty

Of course loyalty and preference go hand in hand and some of the same KPIs apply when tracking this metric. But loyalty is more a measure of dedication to the company and the connection they have to the brand. This is a stronger position to hold than preference.

Equity

This is a look specifically at the lifetime value of all customers who purchase from your brand and company.

Brand equity comes not only in how much an individual customer spends. A customer's value can extend beyond their own purchases to how their online activities directly impact the buying decisions over others.

Net Promoter Score® (NPS®)

This proven metric measures customer experience and predicts business growth. It indicates that you're delighting customers. When you delight customers, they not only spend more and often increase their own lifetime value, they become free word-of-mouth for your company. You can leverage this positive sentiment.

The NPS has transformed the business world and now provides the core measurement for customer experience management programs the world round.

This tool is a simple measure, and you've probably received an NPS survey before. The survey only asks one question "Would you recommend this service (or company) to someone else? Yes or No."

You end up with an undeniable measure of satisfaction with your company that you can track over time by comparing the ratio of yes to no.

S.O. did you know?

"Organic search is responsible for **53% of all site traffic.**" (Zendesk)

Section 11

Keeping Your Brand On Track With The Right Analytics

Are you gaining helpful business insights from your metrics?

According to Qualtrics, market research is “the process of gathering data on what potential customers are looking for and what they need.”

By utilizing these research tools, your brand will have a higher success rate. It is imperative to understand the two types of research. We’ve touched on how social listening tools, NPS surveys, website analytics, and ad analytics tools can help you objectively measure the metrics that matter and keep your brand on track in the last section. Next, we’ll explore how to take a more in-depth look at brand health with the right analytic tools.

Types of Analytics Data

Quantitative Research

Quantitative research relies on numerical values that can be analyzed and compared to judge the quality of a metric you’re using. These numbers can be captured through things like close-ended questions, statistics, and census information.

Breaking quantitative research into the lowest common denominator helps you more objectively over time.

For example, website traffic is a simple quantitative measure. Website traffic can be measured. You can see it going up over time. Similarly, Net Promoter Score is a quantitative measure. You can quickly see trends in this simple, numbers-focused metric.

Some common ways to quantify data:

- **Closed Surveys:** help researchers receive direct feedback from the customers and clients. There are a myriad of different survey tools and methods to maximize data capture with numerically rated answers. Closed surveys are valuable, because it’s easier to identify trends among a large swath of people when you limit the responses they can choose from.

- **Experiments:** usually associated with laboratory test procedures, hypothesis testing or a deductive research method based on numerical values.
- **Most Numerical Online Metrics:** Website traffic, impression, and shares are all numerical measures of how people are interacting with your brand.

But as we all know numbers alone can be deceiving without a look at the quality of that increase. The motivation behind those numbers matters.

Qualitative Research

This focuses on gathering data that shows you the quality of your numbers. It focuses on the feelings, values, and motivations of a consumer. Because at the end of the day “why” a person does something is what matters most.

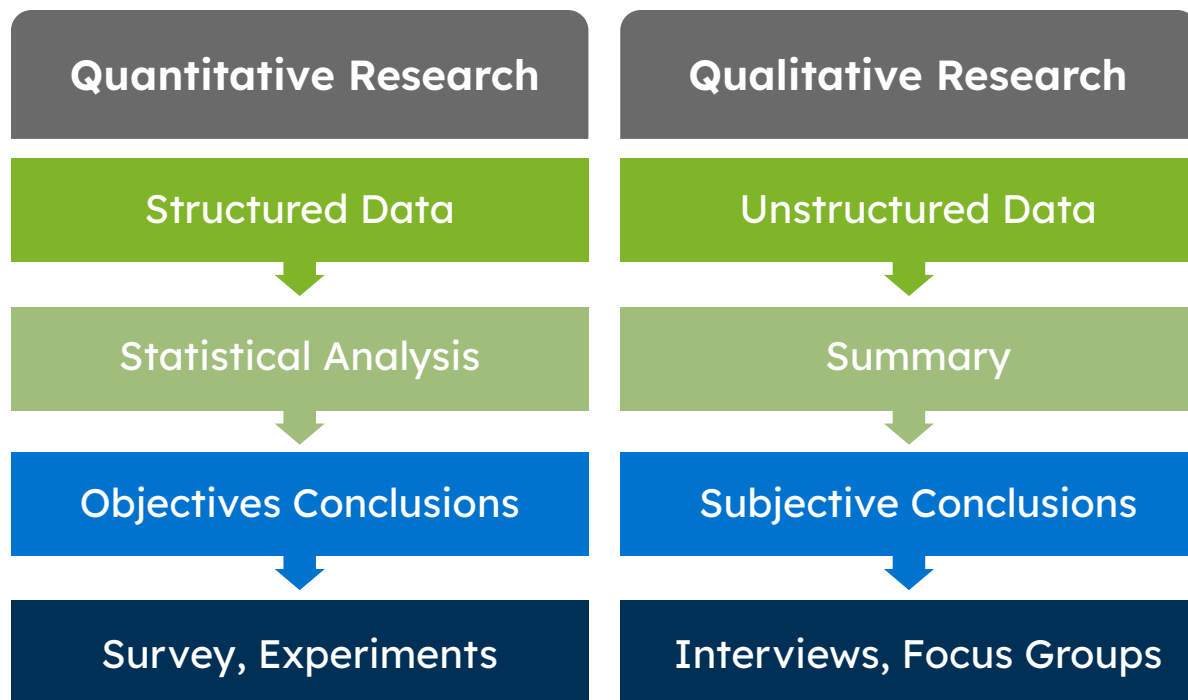
Some very effective ways to gather qualitative data include:

- **Focus Groups:** discussion of a product or topic with a group of people. Generally, a set of open-ended questions are presented by the researcher to the group to gain understanding and awareness.
- **Interviews:** discussion of the product or topic during a one-on-one conversation with questions similar to that of a focus group.
- **Open-ended Surveys:** surveying a cross-section of customers about their experiences with your brand to gain insights into challenges and opportunities.
- **Qualitative Online Metrics:** gathering data that helps you understand why people do what they do online and who’s interacting with you online.

Let’s say your NPS score is rising, but this isn’t translating to increased repeat customers and revenues. That score isn’t reflecting what’s happening among your customers. Take a sub-section of NPS respondents and send them an open-ended survey to learn why they would or would not recommend your company. This qualitative measure provides actionable insights into “why” your score is going up or down.

Similarly, the quality of website traffic matters. If your website traffic increases because of bot traffic or people who aren’t your target audience, those are not potential leads. You want high-quality website traffic filled with people likely to become customers. You have to measure the quality of your traffic.

Why are people visiting? Are they your potential customers? Qualitative metrics like conversion rate and lead-to-sales ratio are just a couple of ways to test the quality of website traffic.



<https://www.qualtrics.com/m/assets/wp-content/uploads/2022/01/Quantitative-Research1.png>

Two Types of Data to Source

Primary Data

This is data that the researcher has compiled firsthand and that was specifically created for the project or set of problems. This generally lends better information but costs more due to higher involvement.

Primary data is often data acquired through direct consent from the people sharing their data. This makes it the more ethical and respectful way to gather information. Examples include interviews, surveys, and focus groups.

First party data can also be collected through your website and email. Depending on the laws where you are, you may have to request consent before collecting or storing this data.



Secondary Data

This form of data collection uses existing data generated for other purposes previously collected by others. This costs less to use, is quicker to access, but can unwittingly yield less-pertinent data. Examples include government statistics, demographics statistics, market research reports, newspaper, and online articles.

Secondary data can also include data collected by platforms like Facebook, LinkedIn, and Google that you can tap into when you run ads on their platform. They don't give you direct access to their data but they allow you to "use" it to target people on their platforms.

Additionally, secondary data can be very helpful for benchmarking and learning best practices to reach and engage your target audience. But there are some drawbacks.

For one, you can't always confirm the quality of this data and whether it directly applies to your unique customer base. And two, you're often in a pay-to-play situation where you have to fork over a percentage of your budget to access their data.

For this reason, it's important to start collecting and analyzing primary data about your traffic, your leads, and your customers as soon as possible, so you can customize your brand strategy to your audience.