



TOOLKIT

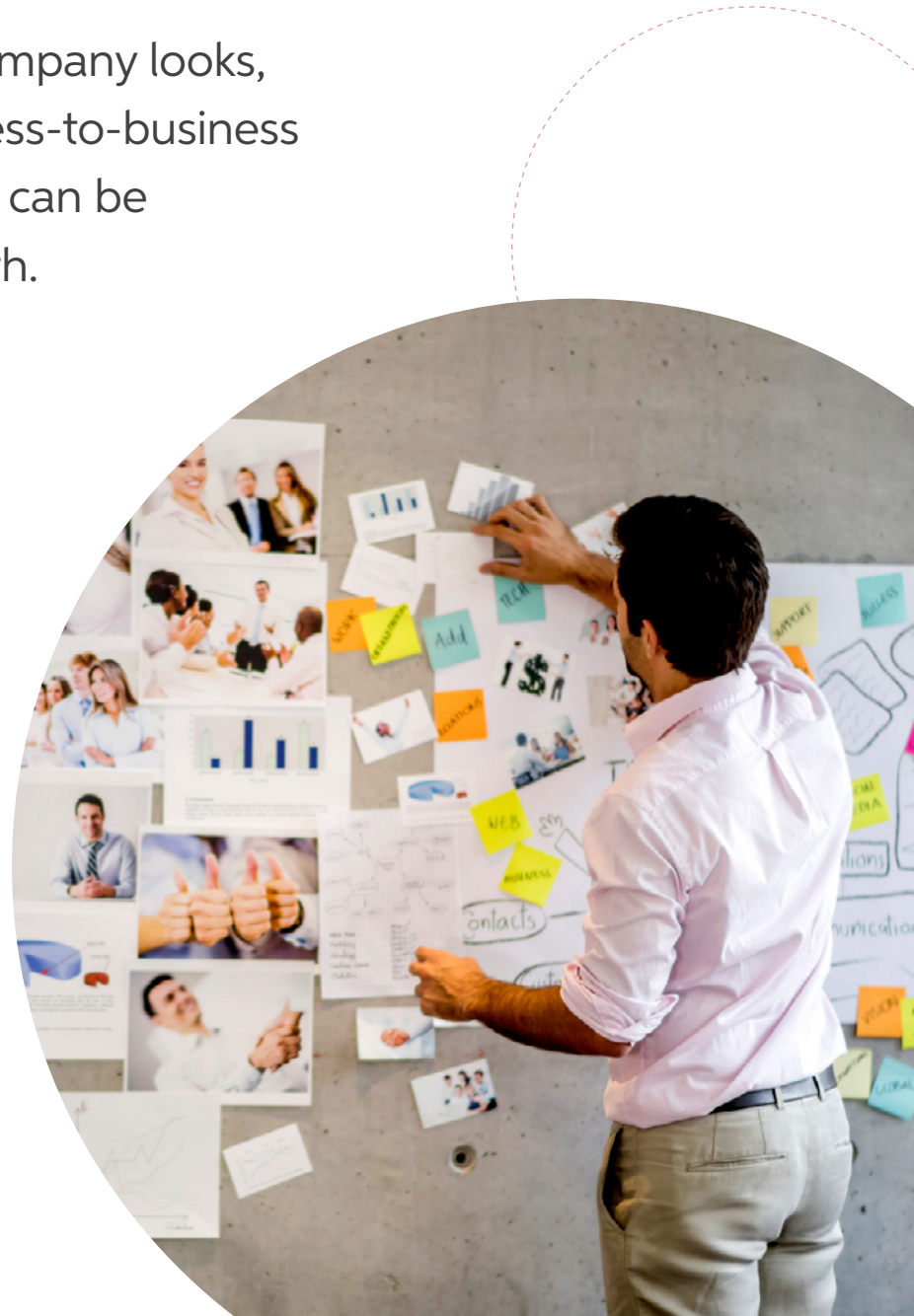
**CREATING A  
COMPELLING  
& RELEVANT  
BRAND IDENTITY**

[B2B EDITION]

A successful brand identity defines how your company looks, feels, and sounds in the marketplace. For business-to-business (B2B) companies large and small, brand identity can be the cause of stagnation or the catalyst for growth.

Luckily, it is something you have control over. If your company is just getting off the ground, pivoting its business model, gearing up for growth, or requiring a facelift, this Toolkit will help you understand and create the key components to a compelling and relevant brand identity.

**Review this Toolkit for a comprehensive look at the key components of a strong B2B brand identity.**



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# The Importance of Brand Identity

A brand identity defines how your company looks, feels, and sounds in the marketplace. Your brand identity is the first impression, second look, and final input to a prospect's decision to work with you.

The [B2B Marketing Mix Report](#) indicates branding as a top area of marketing spend for companies. It's not going anywhere, and it's certainly not getting any easier. As the B2B landscape becomes increasingly saturated in markets such as healthcare, technology, manufacturing and logistics, and business services, competing with an outdated brand identity can instantly relinquish your company from consideration.



# Understanding the Key Components

The key components of a brand identity comprise your company's verbal and visual experience from top to bottom. Here are the main buckets that any strong brand identity must nail down.

## VISIONING STATEMENTS:

Visioning includes your brand's Mission Statement and Vision Statement. These are the first and most important components of your brand identity as your mission defines your brand's purpose to your marketplace, and your vision defines your brand's direction to your employees.

## PERSONALITY & TONE:

Personality and tone define the feel of your brand. It guides your selection of vocabulary, imagery, and calls-to-action and informs your editorial guidelines. Your brand's personality and tone give it life and define how you want to relate and connect with prospects and customers.

## MESSAGING PLATFORM:

Messaging platform includes positioning and key differentiators. It takes seven times for someone to hear something for the first time—so, creating a formalized messaging platform and utilizing it consistently across all marketing channels will be the driving force behind reinforcing your brand.

## VISUAL IDENTITY:

Visual identity is your brand's look. It includes your logo, color palette, imagery, typography, graphics, and iconography that work together to create a visually distinct and cohesive brand. This package is center stage in the marketplace, so it needs to be emotive, memorable, and relatable.

## BRAND GUIDELINES:

Brand guidelines are the glue that holds all these pieces together, ensuring they're used consistently, appropriately, and as-intended by whoever is creating marketing materials for your brand. These guidelines define the do's and don'ts of your brand identity, allowing for a strong look, feel, and sound.

# Brainstorming Your Key Components

Now that you have a basic understanding of the key components that comprise a brand identity, brainstorm your own. As branding experts, we have led more than 200+ companies through our proven brand creation process (page 13), and know how tricky this step can be. Teams often struggle to see beyond the day-to-day operations of their company to the big ideas that are driving their brand's success. This is where a skilled branding agency comes in, helping to facilitate the questions, direct the conversation, and distill multiple answers and perspectives into common themes that will ultimately inform your visioning, positioning, messaging, and visual identity.

**It can't hurt to get the ball rolling, though!  
So, gather your company's leaders and  
use the prompts on the following pages  
to start thinking about the key components  
of your brand identity.**



# Mission

A mission statement explains your company's purpose and why it exists. It's a single, brief statement that summarizes why your company does what it does every day for customers.

## **ASK YOUR KEY TEAM MEMBERS THESE QUESTIONS:**

What is our company's ultimate purpose?

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Why do we exist in the marketplace?

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How do we improve our customers' lives?

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Now, put it all together! Think hard about each of your answers above to find the common denominator in each of them. From there, combine your answers into one statement using precise, concise, and compelling language that would resonate with your target audience.

# Vision

A vision statement explains your company's direction or where you're going. It's a short statement that helps employees envision what the company will look like down the road.

## **ASK YOUR KEY TEAM MEMBERS THESE QUESTIONS:**

What is our long-term goal as a company?

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What do we want to be known for?

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What space do we aim to dominate?

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Same as before... put it all together! Find common threads within your teams' answers. Be sure to capture how your company aims to grow geographically—do you want to operate or be recognized regionally, nationwide, worldwide? This statement will help inform your brand's language and imagery choices.



# Personality & Tone

Personality and tone of voice set standards for how your company should appear, sound, and act externally in all marketing communications and in person through those that represent your brand.

Consider your industry and your audience's state of mind when combing through the answers. You want your brand's personality to resonate with your prospects. It can be defined through three-to-five adjectives that summarize your brand's feel.

Examples include professional, casual, playful, serious, or welcome.

## ASK YOUR KEY TEAM MEMBERS THESE QUESTIONS:

What adjectives would current customers use to describe our company?

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What type of relationship do we have with our customers?

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Are the audiences we serve excited or required to use our services?

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# Messaging Platform

A messaging platform is a series of three or more key messages, also known as value propositions or uniques, that explain why prospects should choose your company over the competition.

As you review your team's answers, try to identify three-to-five really clear and distinct messages. (Overlapping messages can dilute and confuse your brand identity). A common place to start is to bucket your messages into something about your people, process, and product, ensuring each message has specific facts or quantitative proof to back it up.

## ASK YOUR KEY TEAM MEMBERS THESE QUESTIONS:

What makes us different than our competitors?

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What makes us better than our competitors?

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Why do we win and why do we lose deals?

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# Visual Identity

A visual identity system is a complete visual starter pack for business. It encompasses logo design, color palettes, typography, imagery style, and iconography and shows how these elements come together to define your brand's appearance.

The answers to these questions are great inputs for your brand's graphic designer. Using this information, your designer can make informed decisions on what elements of your existing visual identity resonate or hold equity in the marketplace. Those elements can then be combined with new ideas that modernize your brand to align with or differentiate from your competitors, depending on your marketing strategy.

## ASK YOUR KEY TEAM MEMBERS THESE QUESTIONS:

What elements of our existing visual identity hold equity in the marketplace?

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What colors are common in our industry?

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What do we like and dislike about our competitors' visual identities?

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# Brand Guidelines

Brand guidelines are the glue that holds all these pieces together, ensuring they're used consistently, appropriately, and as-intended by whoever is creating marketing materials for your brand.

These questions will give you a starting point for your brand guidelines. These guidelines define the do's and don'ts of your brand identity, allowing for a strong look, feel, and sound.

## ASK YOUR KEY TEAM MEMBERS THESE QUESTIONS:

What style of copywriting best depicts our brand?

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What versions of our logo are acceptable and unacceptable?

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What attributes define our imagery style?

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# Using Your Brand Identity in Marketing

Even the best brand identity in the world could miss the mark if it's not properly applied to your marketing tactics. Use these checklists to ensure your website, digital, content, inbound, and traditional marketing channels are strongly representing and reinforcing your brand identity.

## WEBSITE & DIGITAL MARKETING

- Proper logo format and placement
- On-brand imagery, graphics, and typography
- Tone of voice in headlines and copy
- Bold usage of messaging platform
- Calls-to-action align with personality

## CONTENT & INBOUND MARKETING

- Blog topics align with mission statement
- Tone of voice is captured in titles and copy
- Designed content represents visual identity
- Messaging platform is touted when appropriate
- Social media aligns with full brand identity

## TRADITIONAL MARKETING

- Ads leverage messaging platform
- Event signage represents brand identity
- Brochures capture messaging and visual
- Sales materials reinforce marketing efforts

# Brand Identity Services & Processes

Creating a strong brand takes a lot of work. It requires rising above the day-to-day operations of your company to see the big picture—something that’s a lot easier said than done. To help you rise above the details, most companies lean on the expertise and proven process of an agency. Here’s ours:

## STEP 1. DISCOVERY

We gain a complete understanding of your company’s situation through a brand audit, market situation analysis, and a competitive assessment.

## STEP 4. BRIEF

We create a brand brief to converge on ideas from the first three steps and verify that all ideas were heard and interpreted correctly before moving forward with our formal recommendations.

## STEP 2. INTERVIEWS

We conduct primary research in the form of interviews with your company’s key stakeholders, such as management personnel, employees, and partners, as well as current and former customers.

## STEP 5. FINAL PRODUCT!

We create and present our recommendations to you and your team, calling on our decades of experience, business acumen, and reputation of quality work to impress and delight.

## STEP 3. WORKSHOP

We coordinate a half-day workshop with key members of your business and the Sagefrog team to brainstorm and put all ideas on the table about the core components of your brand identity.

## STEP 6. BRAND ACTIVATION

We put your brand identity in action for you, planning the internal and external brand launch and immediately applying assets to your website, marketing materials, and tactics.



# Helping You Along Your Branding Journey

Sagefrog has developed more than 200 brands. We have a proven brand identity creation process that facilitates competitive research, buy-in from stakeholders, strategic thinking around the questions prompted here, and expert copywriting and design to distill all of that input into a polished brand identity.

## TYPES OF BRAND IDENTITIES WE CREATE



Brand & Company Identities



Product & Service Identities



Employer Identities  
(for help recruiting and retaining talent)



Influencer Identities  
(for help promoting thought leaders)

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Thinking about engaging the experts to create your brand identity? Contact us.

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# About Sagefrog Marketing Group

Sagefrog is a top B2B marketing and branding company with specialties in healthcare, technology, industrial, and business services. With offices in Doylestown, Princeton, Lehigh Valley, and Philadelphia, we're dedicated to accelerating client success through brand building and integrated marketing. We provide strategy and branding, websites and digital, content and inbound, and traditional marketing services through our proven process, JumpStart™.

**FOR MORE INFORMATION OR HELP  
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