



CHECKLIST

DEFINING YOUR BRAND FOUNDATION



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This checklist will help you establish the core elements of your brand identity—the essential foundation that shapes everything from your visual design to your marketing strategy. A strong brand core acts as your decision-making filter and helps attract your ideal audience.

Checklist

1. Define Your Brand Mission & Purpose

- ☐ **Draft your mission statement**

Craft a single, clear sentence that explains what your business does daily—the practical work your team performs to solve specific problems. Avoid industry jargon and speak plainly about the tangible activities and services you provide.

- ☐ **Craft your purpose statement**

Write a statement that captures why your business exists beyond making money—the meaningful difference you're trying to create in the world. This purpose drives your team and attracts customers who share your vision.

☐ **Test for clarity with outsiders**

Share your mission and purpose statements with someone outside your industry and ask them to explain it back to you. If they can't articulate what you do and why it matters, revise until the message is crystal clear.

☐ **Document specific examples**

List concrete examples of how your mission and purpose show up in your daily operations. This helps your team understand how these abstract concepts translate into practical actions.

2. Clarify Your Brand Values and Personality

☐ **Brainstorm potential values**

Generate a comprehensive list of 15-20 possible values that could guide your brand's decision-making and behavior. Include words that reflect what your organization truly stands for.

☐ **Narrow to core values**

Systematically eliminate the least essential values until only 3-5 core values remain. These become your guiding principles for all business decisions and communications.

☐ **Translate values into behaviors**

For each core value, define 2-3 observable behaviors that demonstrate this value in action. This helps team members understand how to live these values in their daily work.

☐ **Define your brand voice characteristics**

Choose three words that describe your brand's tone (e.g., bold, warm, expert) to guide your communication style across all channels. This ensures consistency in how you sound to your audience.

☐ **Create a value-to-voice matrix**

Build a simple chart showing how each core value translates into specific communication principles and customer benefits. This connects your internal values to external expressions.

3. Craft Your Unique Positioning Statement

☐ **Identify main competitors**

List your primary competitors and analyze their positioning, noting their target audience, key benefits, and overall personality. This helps you find gaps in the market you can fill.

☐ **Identify your unique differentiators**

Document what makes your approach, methodology, or offering genuinely different from alternatives. Focus on aspects that deliver meaningful benefits to your customers.

☐ **Draft your positioning statement**

Using the template "For [target audience], we are the [type of offering] that [key benefit] because [core differentiator]," write your positioning statement that clearly explains who you serve and why they should choose you.

☐ **Gather proof points**

Collect specific evidence that supports your positioning claims, such as data, testimonials, or proprietary methods. This provides credibility to your brand's promises.

☐ **Test with actual customers**

Share your draft positioning with members of your target audience and ask for their honest reaction. Revise until it genuinely resonates with the people you aim to serve.

4. Document and Integrate Your Brand Core

☐ **Create a brand core document**

Compile your mission, purpose, values, personality traits, and positioning statement into a single accessible document that serves as the source of truth for your brand foundation.

☐ **Develop a brand decision filter**

Create a simple set of questions based on your brand core that can help evaluate future opportunities and initiatives. (e.g., "Does this align with our purpose?" "Does this reinforce our positioning?")

☐ **Present to your team**

Schedule a dedicated session to share your brand core with your entire team, explaining how these elements should influence their daily work and decision-making.

☐ **Plan quarterly reviews**

Set up a regular schedule to revisit and potentially refine your brand core elements as your business evolves and market conditions change. Your brand should remain living and adaptable.