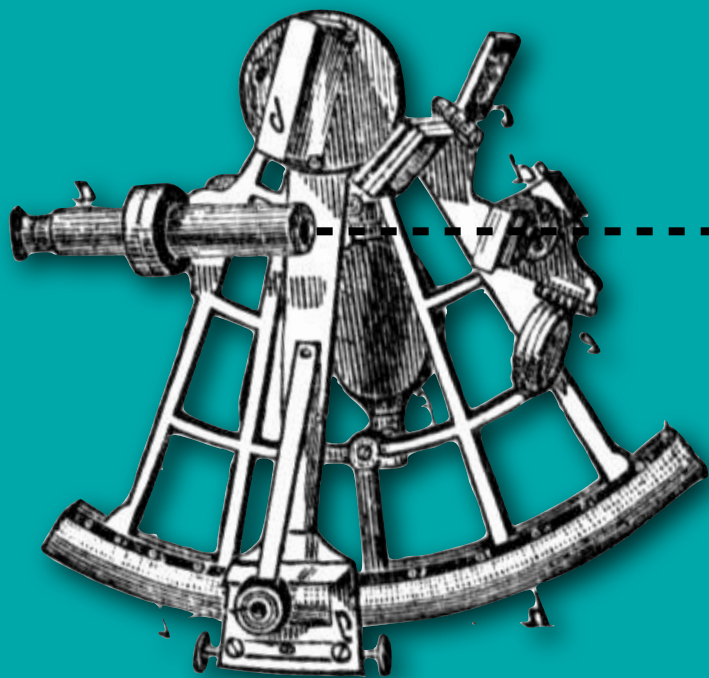


FREE



**GET YOUR BRAND BEARINGS**  
STRATEGY SESSION WORKSHOP

Idea Sandbox  
IDEA-SANDBOX.COM

SO YOU WANT TO GROW YOUR COMPANY, products, services, customers, or employees? Good for you! However, before you act and head in any direction, you first need to determine where you are.

This GET YOUR BRAND BEARINGS workshop serves as an analog Global Positioning System for your brand. You can also use this to gain sense of direction for a product, service, employee, or any aspect of your company. Happy Navigating!

– PAUL WILLIAMS

*Brainstormer, Idea Sandbox*

## Summary

In this strategy session, we identify word-pairs that define brand qualities. We then plot on a continuum where we currently rank, and where we would prefer to rank. The gaps (if any) between current and preference indicate areas needing our attention. For this exercise, you will need:

- ▶ Your identified need or challenge,
- ▶ Your team,
- ▶ Large pages, whiteboards, (something big to write on), and
- ▶ A few markers of different colors.

You could spend an hour or several on this exercise, based on how deep you wish to dive into the details.

I recommend recruiting someone to help you write comments on the large pages. This allows you to focus on the team instead of having your back to them, writing the whole session.

## Let's get started!

### STEP 1 - DEFINE YOUR GOAL

What are you measuring against? If you're deciding you want to *be the best* you need to first define what it is to be *the best*, and as measured by what or whom?

What is your end state? What is all this being compared to? A vision or mission statement? 10-year goal? Is this how customers see you? Is this how you see yourselves? Establishing these will make the rest of the exercise run more smoothly.

### STEP 2 - BRAND LISTING

Before we talk about our situation, first we're going to examine other brands. Big enough for everyone to see, write a list of brands. These should be brands almost everyone in the room is familiar with. Pick those you admire, and maybe those you don't. Sure, include your competition, but the point of this exercise isn't about comparing. Come up with a list of at least 10 brands. Your list could start with:

APPLE, THE DISNEY COMPANY,  
COCA-COLA, EBAY, FEDEX, WALMART, ETC...

To speedup this step, you could skip having the team brainstorm names and prepare a page with names and logos beforehand featuring. *Google Images* is an excellent resource. Search "company logos" and you're done!

### STEP 3 - BRAND ADJECTIVES

Using this list of companies or logos, think-up adjectives people use to describe these companies. Use one or two-word descriptions. These can be positive or negative words. Think-up at least 5 adjectives per company.

SLICK, INNOVATIVE, MAGICAL, REFRESHING, GLOBAL,  
CONVENIENT, QUICK, PLENTIFUL, LOW PRICE...

Record the responses. If you keep naming the same quality, there is no need to rewrite it. Circle it to indicate a popular or common attribute.

### STEP 4 - REMOVE DUPLICATES & GROUP

Now, you should have at least 50 words. Review this list crossing out duplicates and highly similar words. Draw lines connecting similar terms. You'll probably end up with 20 or so terms.

If you're using a whiteboard, before wiping away information, consider taking photos. You may wish to refer to these terms later.

### STEP 5 - THINK-UP OPPOSITES

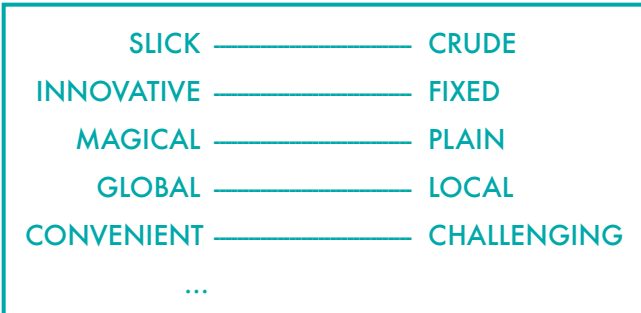
Using a couple new sheets of large paper, list these 20 or so terms along the left-hand side of the page. (They can be close together - written one below the other - but leave space to the right for more writing.)



SLICK  
INNOVATIVE  
MAGICAL  
GLOBAL  
CONVENIENT  
...

ADJECTIVES, LISTED LEFT

Then on the right hand side, write the opposite quality. Draw a line between the two words. This will become the continuum that you will use to gauge where your company falls.



SLICK — CRUDE  
INNOVATIVE — FIXED  
MAGICAL — PLAIN  
GLOBAL — LOCAL  
CONVENIENT — CHALLENGING  
...

ADJECTIVES AND THEIR OPPOSITES

### Clarify

Before continuing to **STEP 6** you may want to decide, as a group, what these words imply. What it specifically means to be *slick* or *convenient*. What actions and behaviors are associated with each term? Does *quick* mean you respond to industry changes quickly? Or, is it that you get new concepts in your stores rapidly? Or that you provide quick service? Clarifying the words will help the team better understand the next steps.

## STEP 6 - MARK YOUR RANKINGS

Where do you fall within the ranges? Answer the following questions and use a different shape and color for each. Start in pencil first while the group discusses and debates. When there is agreement, make a mark. (If you can't agree, use a question mark to indicate the most agreed upon positions.)

### Where Are We?

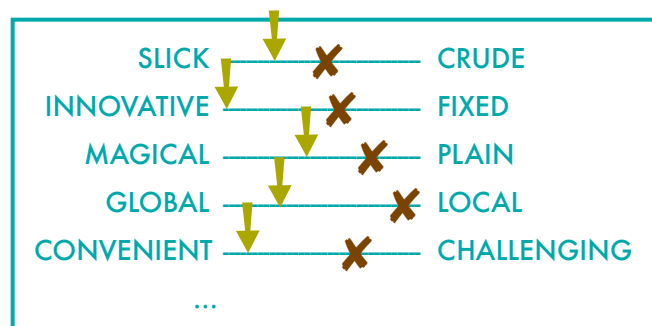
Where do we currently fall on this line? To the extreme right, left, or somewhere between? Mark these points.

✗ = Where we are.

### Where Should We Be?

Considering the goals identified in **STEP 1**, where should we be? Mark these points.

↓ = Where we should be.



WHERE ARE WE, WHERE SHOULD WE BE

## Where Could We Be?

Let's take this one step further. Imagine what you could do if you had unlimited budgets, or unlimited people-power... Instead of where you SHOULD be, imagine where you COULD be if you were free from current constraints.

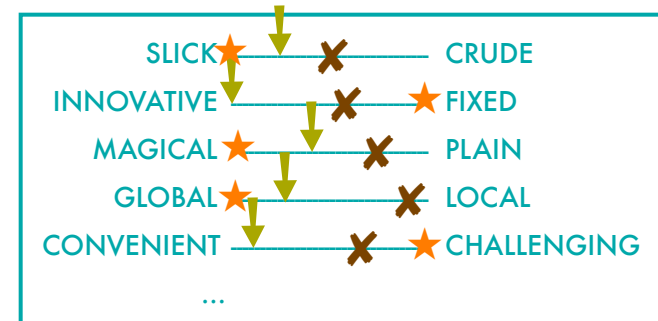
Pick one or more of the scenarios below to indicate where you *could* be.

★ = Where we could be.

### Scenarios:

- ▶ If you had all the money in the world...
- ▶ If you had more locations than McDonald's...
- ▶ If you could freeze time (to do what you needed)...
- ▶ If you had all the people power in the world...
- ▶ If everything you attempted was guaranteed a success...

The answers to these scenarios may not align with your goals, but they spark alternative ideas and further thought.



WHERE ARE WE, WHERE WE SHOULD, AND COULD BE

This helps you see what you could be doing if you weren't restrained by lack of funding, competing priorities, brand guardrails, fear, etc...

As you answer and mark each question, be attentive to the conversation. In the discussion, you will hear reasons you are, and are not, where you want to be.

Whoosh! That was great! Take a break. Return in a few minutes and move to **STEP 8**.

## STEP 8 - WALK THROUGH

Now walk through and read the graphs back to the team. Or, have different team members take turns. Describe how you've marked the terms and highlight the discussion that brought you there.

This play-by-play recaps the work you did, puts pieces together, and helps make the information more workable. Make sure someone makes notes of the conversation during the walk through. Be sure to assign specific tasks to team members to ensure ideas turn into action.

### Walk Through example:

*"We say we want to be fairly slick, but we still appear pretty crude. We attributed this to our online and offline materials looking out-of-date. We mentioned, hiring a designer may help. We want to be innovative, but we're closer to fixed. Finishing that trend study and putting it to use will help us here..."*

## STEP 9 - NEXT STEPS

CONGRATULATIONS! Consider these lists your dashboard indicating current and desired conditions. You've broken the challenges into smaller pieces, and each indicator can be addressed individually.

Now, determine what it takes - tasks, people, process, funding, etc - to move from *where you are* to *where you want to be*.

*Best of Luck!*



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