

Branding & Marketing Worksheet

0) WARM-UP

Choose three feelings for your brand:

- | | | |
|----------------------------------|-----------------------------------|--------------------------------------|
| ☐ Warm | ☐ Trusted | ☐ Joyful |
| ☐ Modern | ☐ Grounded | ☐ Premium |
| ☐ Playful | ☐ Expert | ☐ Handcrafted |

One-sentence brand story (plain English):

1) MISSION & VALUES

Mission (1–2 sentences):

Top values (choose three):

- | | | |
|-------------------------------------|---------------------------------------|--------------------------------------|
| ☐ Local | ☐ Sustainable | ☐ Quality |
| ☐ Affordable | ☐ Innovative | ☐ Traditions |
| ☐ Community | ☐ Transparency | ☐ Handcrafted |
| ☐ Healthy | ☐ Fast | ☐ Premium |

What each value looks like in action (three examples):

2) AUDIENCE SNAPSHOT (WHO IT'S FOR)

Segment	Need/Job to be done	Pain/Barrier	Where & When to Reach (channels + moments)	Message That Matters (1-sentence hook)	Offer / CTA (next step)
Audience A	_____	_____	_____	_____	_____
Audience B	_____	_____	_____	_____	_____
Audience C	_____	_____	_____	_____	_____

★ Star your primary audience above.

3) BRAND VOICE & TONE

Choose three traits:

- | | | | |
|--|-----------------------------------|---------------------------------|---------------------------------|
| ☐ Warm | ☐ Friendly | ☐ Clear | ☐ Caring |
| ☐ Confident | ☐ Playful | ☐ Expert | |
| ☐ Down-to-earth | ☐ Elegant | ☐ Bold | |

Do say (phrases to reuse):

Avoid saying:

Signature line / tagline (3–6 words):

4) NAME & TAGLINE BASICS

Name - Option 1:

Name - Option 2:

Name - Option 3:

Name - Option 4:

Name - Option 5:

Quick checks (tick all that apply):

- | | | |
|---|---|--|
| ☐ Easy to say | ☐ Easy to spell | ☐ Memorable |
| ☐ Not taken nearby | ☐ Domain available | ☐ Social handle available |
| ☐ Fits future growth | | |

Final name:

Final tagline:

5) COLORS & TYPE (MINI STYLE GUIDE)

Primary HEX _____

Accent HEX _____

Neutral/Dark HEX _____

Light background HEX _____

Legibility checks:

☐ High contrast ☐ Works in B/W ☐ Prints accurately

Typography: Heading font (H1/H2 sizes) _____

Body font (size / line-height) _____

6) LOGO DO'S & DON'TS

Required files:

☐ Full logo (color) ☐ Full logo (1-color) ☐ Icon/mark
☐ Vector (SVG/PDF/AI) ☐ PNG (transparent) ☐ Favicon / social square

Minimum size: _____

Clear space: _____

Backgrounds allowed: _____

Don'ts:

☐ Stretch ☐ Drop shadows ☐ Re-color ☐ Crowd with text

7) IMAGERY (PHOTOS/GRAPHICS)

Style words (choose 3–5):

☐ Natural ☐ Warm ☐ Clean
☐ Rustic ☐ Modern ☐ Bright
☐ Moody ☐ Candid ☐ Editorial

People (who/how):

Product (angles/close-ups):

Place/Process:

8) TOUCHPOINT MAP (MAKE EACH PLACE SAY THE SAME THING)

Touchpoint	Headline/Hook	Must-have Info	CTA	Owner	Due
Market table sign	_____	_____	_____	_____	_____
Retail shelf label	_____	_____	_____	_____	_____
Website home	_____	_____	_____	_____	_____
Social profile bio	_____	_____	_____	_____	_____
Email signature	_____	_____	_____	_____	_____
Packaging/insert	_____	_____	_____	_____	_____

9) ELEVATOR PITCH (30–45 SECONDS)

Template: “We’re _____, a _____ brand that helps _____ by _____. Choose us for _____ so you can _____.”

10) BRAND TOOLKIT CHECKLIST (DELIVERABLES TO FINISH)

- ☐ Mission & values one-pager
- ☐ Audience snapshot (primary + secondary)
- ☐ Voice & tone guide (3 traits + do/avoid phrases)
- ☐ Logo package (vector + PNG, color + 1-color)
- ☐ Mini style guide (colors/HEX, fonts, usage)
- ☐ Photo starter set (10–15 on-brand images)
- ☐ Touchpoint copy (market sign, shelf label, bio)
- ☐ Elevator pitch
- ☐ File naming & folder system set up (folder/location)

11) 30-DAY ACTION PLAN (KEEP IT SIMPLE)

Goal (pick one):

- ☐ Increase market sales
- ☐ Grow pre-orders
- ☐ Grow email list
- ☐ Retail placements

Day	Action	CTA/Asset
Mon	_____	_____
Wed	_____	_____
Fri	_____	_____
Weekend	_____	_____

One offer (deadline): _____

Three metrics to watch:

Metric 1 _____

Metric 2 _____

Metric 3 _____

12) CONSISTENCY CHECK

- | | |
|---|--|
| ☐ Same name everywhere | ☐ Same logo & clear space |
| ☐ Same colors & fonts | ☐ Same voice & tagline |
| ☐ Same CTA language | |

Notes / Next tweaks: