10 Lessons from a Rebrand

Rebranding CFED to Prosperity Now
Lesson One: Listen First

- Hold listening sessions with your staff and board
  - Include clients, partners and funders when possible.
  - Create a safe environment to get real feedback

- Questions to ask:
  - How do you answer the question “what do you do”?
  - How does your elevator pitch differ among different audiences?
  - What 3 personality attributes would you use to describe the organization?
  - What words or phrases do you avoid using?
  - What elements, phrases or imagery would you like to see lifted up more in our brand?

- Use the feedback to jumpstart your brand refresh
Lesson Two: Seek Out Advice

- Learn from those who came before you
- Reach out to everyone you can to ask for advice
- You will get tools and insights that you never would have thought of
- And then pay it forward!
## Lesson Three: Get the RIGHT Buy-in

<table>
<thead>
<tr>
<th>The Who Questions</th>
<th>The Real Answers</th>
<th>How to Use Them</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who wants to be at the table?</td>
<td>Literally everyone</td>
<td>Before and after – not during</td>
</tr>
<tr>
<td>Who needs to be at the table?</td>
<td>Dependent on office culture</td>
<td>Formal presentations; Survey for feedback at key moments</td>
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<tr>
<td>Who needs to feel their voice has been heard?</td>
<td>Those with big egos</td>
<td>One-on-one meetings</td>
</tr>
<tr>
<td>Whose input do you value?</td>
<td>Strong leaders with good instincts</td>
<td>They are your brain trust. Make them your core team.</td>
</tr>
<tr>
<td>Who ultimately will be the decider?</td>
<td>Likely your CEO</td>
<td>Your brand cheerleader</td>
</tr>
<tr>
<td>Who will the decider lean on for input?</td>
<td>You or an outlier</td>
<td>Get their buy-in first, before going to your decider</td>
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</table>
Lesson Four: Plan Carefully

- Map out contents and events that will best showcase your brand themes
- Choose a time that is a little slower for staff
- Find your alleys in the organization to help (Human Resources, IT, Operations)
- Don’t forget the housekeeping tasks
Lesson Five: Create Branding Tools

- Create your Brand Platform (Vision, Mission, Brand Pillars, Brand Personality)

- Develop a Messaging Playbook
  - 3-5 key messages for each area of work
  - How to customize an elevator pitch
  - An overview of your audiences and how you communicate with them
  - Examples of pre and post brand refresh
  - How to use your brand personality in your communications

- Organize your Brand Assets in a Branding Guide
  - Guidelines for logo use
  - Brand colors
  - Updated templates (letterhead, PPT template, One-pagers)
Lesson Six: Conduct a Communications Audit

- Refresh or retool all of your communications channels and tools
  - Website
  - Email marketing
  - Social media
  - Ads
  - Publications, one-pagers or brochures
  - Event templates
  - Word and PPT templates

- Worried you are missing something? Google is your friend!
Lesson Seven: Build your Brand Ambassadors

- Staff and Board
  - Messaging trainings
  - Make brand assets and messaging tools super accessible and easy to find

- Partners
  - Have a roll-out strategy that makes your partners feel important
  - Arm your partners, clients and funders with a marketing toolkit

- Onboard new staff with a brand ambassador training
Lesson Eight: Make it Personal

- Send staff a checklist to update their brand touchpoints
  - Personal social media profiles
  - Bios on your website and on LinkedIn
  - Email signatures
  - Voicemail recording
  - Provide them with a template email to share with friends and family

- Craft and practice those elevator pitches! Hold a mocktail happy hour. Set up different mock networking settings so staff can practice on each other.
Lesson Nine: Flip the Switch in One Day

- Inform Key Stakeholders
- Month-Long Teaser Campaign
- Flip the Switch Day
- Month-Long Post-Launch Campaign
Lesson Ten: Celebrate! (and then keep it fresh)

- Bask in the success of your new brand!

- Set up your metrics tracking system to measure the impact of your brand
  - Brand Awareness: Web traffic, Google searches, social media impressions
  - Brand Credibility: Media hits, social media engagements, mailing list size

- Do a Quarterly Review
  - Keep your brand fresh by scheduling a review of all of your communications channels and brand assets on a quarterly basis.

  - Create a check-list to use during your review from your Communications Audit