

# It's your brand; own it!

## Introducing the NEW... Brand Ownership Manual™

To help business owners take control of your brand, we have developed the Brand Ownership Manual™ - everything you need to know about your brand in one place; in one system.

Based on our intellectual property, expertise and experience working with hundreds of companies, the Brand Ownership Manual™ teaches you everything you need to know about branding and marketing. Comprised of 8 sections, the Brand Ownership Manual™ contains over 50 exercises, templates, tools and benchmarks that become the foundation for owning your brand.

We are not just handing you a manual, rather, The Brand Ownership Manual™ is part of a complete system that will take you through every element of brand ownership. In either a one-on-one setting or a group environment you will learn what matters most.

When you take responsibility for your own brand, you will:

- ◆ **Stop spending money on marketing that does not work.**
- ◆ **Become efficient and disciplined in managing your brand.**
- ◆ **Stay relevant in a rapidly changing business environment.**

Ultimately, Brand Ownership is about building a brand that reflects your principles and values – that inspires people to embrace your ideas, purchase your products and talk about you in the market place.

To learn more about the Brand Ownership Manual™ visit [www.thetricycle.com](http://www.thetricycle.com) or call 208-287-8191.

8 Sections of the  
Brand Ownership Manual™

|   |  |
|---|--|
| 1 | <b>ASSESSMENT</b><br>A realistic view of where your brand is today.                        |
| 2 | <b>DIFFERENTIATION</b><br>Discovering what makes your brand truly different.               |
| 3 | <b>MESSAGING</b><br>Creating sharp messaging to penetrate your marketplace.                |
| 4 | <b>BUSINESS DEVELOPMENT</b><br>Developing an action plan to reach your goals.              |
| 5 | <b>STRATEGY</b><br>An overall plan that will guide and direct your brand.                  |
| 6 | <b>BRAND OWNERSHIP TRAINING</b><br>Further sessions to help you own and manage your brand. |
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# INTRODUCTION



## Brand Ownership Manual™

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## OVERVIEW

### ENGAGEMENT PREP

To kick-off our engagement with you, we are requesting some “homework” from you. This helps us get to know you better, understand your priorities, and get a picture of previous branding/marketing efforts.

#### The List:

- Please write up your organization’s story in “free form”. If you have an existing company bio, that will work too!
- CEO profile – we will send this to you separately.
- Please send us key team member bios/resumes.
- Please provide any existing business and/or marketing plans that you feel would be helpful.
- Please feel free to send us any other documentation that you feel is relevant to our efforts.
- Please create a sales/marketing collateral packet and bring to Session 1. This would be business cards, brochures, print advertising, etc.

We will review the above in our 1-hour prep session with you, so please be sure to send to us in advance of that meeting (with the exception of the sales/marketing collateral).

### BRANDING PRINCIPLE #1

Be true to who you are, not what others want you to be.

### OVERVIEW

#### SESSION 1: TRUE DIFFERENTIATION

**The Rules:** All top executives that affect the organization's strategic direction should attend this session.

**The Format:** Justin Foster will lead your team through a workshop-style session. The format of the session is interactive. Debate and challenging assumptions are both expected. Session 1 is typically ½ day to a full day.

#### The Agenda:

- Introductions and Expectations
- Review COIN perception survey
- Review CEO profile w/ team
- Determine Commander's Intent
- Definition of "brand" and "branding"
- File Folder exercise
- Core Values exercise
- Profile of the ideal customer
- Oatmeal v Bacon™ differentiation exercise
- Determining next steps and immediate actions

As a follow-up to Session 1, we will send an initial findings/recommendations document.

As a reminder, Session 2 will cover Messaging and Session 3 will focus on creating a Business Development plan.

#### BRANDING PRINCIPLE #2

Every brand has a purpose; a reason for existing.

### OVERVIEW

#### SESSION 2: SHARP MESSAGING

**The Rules:** All top executives that affect the organization's strategic direction should attend this session.

**The Format:** Justin Foster will lead your team through a workshop-style session. The format of the session is interactive. Debate and challenging assumptions are both expected. Session 2 is typically ½ day to a full day.

#### The Agenda:

- Review of Session 1
- Review open issues or questions
- Define The Simple Process
- Select top differentiators for messaging
- Define target audience and ideal customer
- Determine "Simple Idea"
- Discovery Triangle exercise
- Create Talking Points outline
- Document immediate findings and recommendations

As a follow-up to Session 3, we will send an initial findings/recommendations document.

As a reminder, Session 3 will focus on creating a Business Development plan.

#### BRANDING PRINCIPLE #3

Conversations create relationships, which create transactions.

## OVERVIEW

### SESSION 3: RIGHT NOW BUSINESS DEVELOPMENT

**The Rules:** All top executives that affect the organization's strategic direction should attend this session.

**Format:** Justin Foster will lead your team through a workshop-style session. The format of the session is interactive. Debate and challenging assumptions are both expected. Session 3 is typically ½ day to a full day.

#### The Agenda:

- Review of Session 2
- Review open issues or questions
- Pyromarketing™ exercise
- Select the right marketing tools
- Determine sales goals/ performance metrics
- Determine method(s) for tracking results
- Review COIN tool
- Outline business dev plan for first 90 days
- Document immediate findings and recommendations

As a follow-up to Session 3, we will send an initial findings/recommendations document.

As a reminder, from this stage we will develop the overall brand strategy as well as a 90-day business development plan.

### BRANDING PRINCIPLE #4

Once you know what to say, you'll know what tool to use.

### OVERVIEW

Every brand needs a brand strategy. Strategy will guide your brand and will aid you in making decisions that affect your brand. You can place your brand's strategy in this tab to help keep you organized.

In addition to an overall Brand Strategy, you will also need a Business Development Strategy. This 90-Day Strategy will show you what initiatives you will be using as well as how to track your success. This will also be supplemented with intermittent Strategy Briefs.

Finally you will receive a Brand Strategy PowerPoint™. This document summarizes your brand strategy. You can share this document with employees as well as COINs to help communicate your brand and strategy.

### BRANDING PRINCIPLE #5

Every decision should align with your strategy.

### OVERVIEW

Ongoing education and training resources should be added to this tab. Also, if you are still unclear in certain areas of your brand, you are able to discuss your questions in Tricycle University's classroom setting. Your BOM includes six Tricycle University Sessions in the pod of your choice.

## *Tricycle University*

Tricycle University is designed to help re-educate the marketplace on branding and marketing. Like the BOM, Tricycle University will help you to grow, develop and manage your own brand.

**The Sessions:** Sessions meet once per month for approximately three hours. Tricycle University sessions will feel very similar to individual sessions with the exception of a larger group dynamic.

These sessions will help you to:

- Break the conformity mold.
- Make marketing easier.
- Learn the latest tips and tools.
- Bring discipline and accountability to the marketing process.
- Increase sales and lifelong relationships.

### BRANDING PRINCIPLE #6

Continued education is critical for your brand's optimum performance.

### OVERVIEW

Accountability and discipline are keys to marketing and business success. Accountability needs to be organized and clear to ensure all parties are aware of their responsibilities and are able to execute them properly.

In these sessions, we will be covering and reviewing the:

- Brand Strategy
- Accountability Worksheet
- Perception Surveys
- Performance Metrics
- New Ideas/ Opportunities
- Brand Benchmark

In addition to this, we will also provide:

- Speed Dial Access
- Creation and Oversight of Rolling 90 Day Plans
- Relationship Brokering

Finally, you will be expected to:

- Provide Status Reports
- Conduct and Collect Perception Surveys
- Follow Guides and Tools

This tab will also be able to be used for any general notes that you may have or other related articles.

### BRANDING PRINCIPLE #7

If it does not produce the desired results, stop doing it.

### OVERVIEW

The Resources tab is designed to provide additional resources to encourage brand ownership and management. There are a variety of resources for each of the marketing initiatives:

- 1) **Awareness** [*uh-wair*], noun. When customers become conscious that you are in business.
- 2) **Engagement** [*en-geyj-muhnt*], noun. When you connect with your tribe in-person or online.
- 3) **Experience** [*ik-speer-ee-uhns*], verb. When your customers try your product or see your service in action.

Also, included is a section that is designed to help provide internal structure and further resources that do not fall under the three areas listed above.

### BRANDING PRINCIPLE #8

Reality + Reputation + Recognition = **Relevance**