



Strategic Branding 101

A Creative Guide to Brand Strategy
for Wealth Managers

Tools and principles that can help you enhance your
brand reputation and achieve your business objectives.

2021



5 Essential Strategic Branding
Principles to Elevate Your Brand

Strategic Branding 101

A Creative Guide to Brand Strategy for Wealth Managers

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What Is a Brand?

Isn't your brand the same as your logo? No, it is not. A logo is part of a visual identity, but a brand expresses a reputation. Your reputation is earned through every interaction you have with your clients as they explore the services or products your business offers.

Strategic Branding brings together creativity and strategic thinking to enhance a brand's reputation. It also helps shape the brand's expression – the way a brand becomes a visual, audible and tactile experience. Over time, clients become familiar with

this package of visible, verbal and tangible elements. It's the way they experience, remember and connect with your brand – and your business.

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“Your brand is what other people say about you when you're not in the room.”

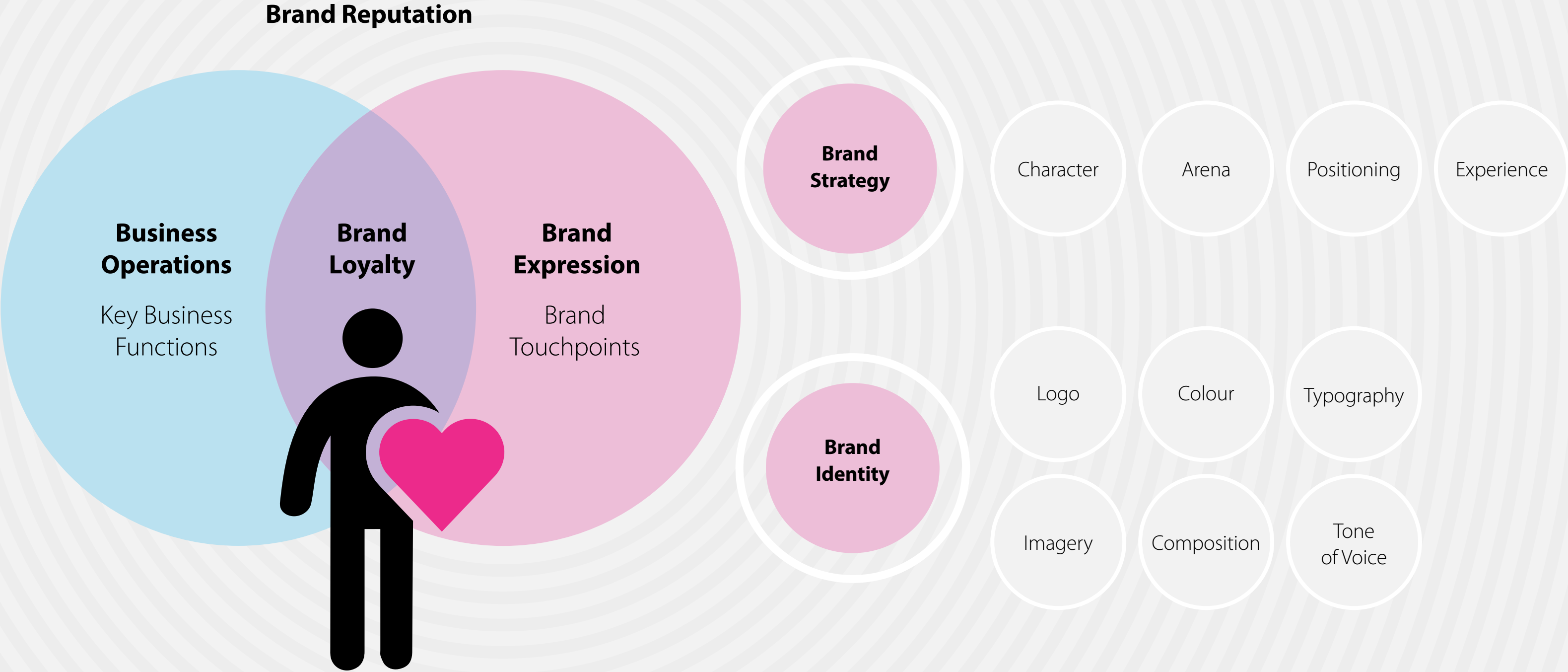
Jeff Bezos, founder of Amazon



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Strategic Branding

Strategic thinking meets creativity to enhance your brand reputation.



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How to Enhance Your Brand Reputation

If a business takes pride in the value of the services or products it offers, this can positively influence its brand reputation.

To help businesses achieve this, Strategic Branding takes a creative approach that incorporates strategic business insights. Key business functions – such as finance and human resources – play a vital role in the operations of a business. But keep in mind, a brand's expression is almost always the first point of contact with clients. This is what they see, hear, feel

and experience. Your business should take a proactive approach, leveraging the influence a brand can exercise to shape clients' impressions and enhance their experience.

How can your business influence your brand reputation?

Business Operations

Key Business Functions

Products or services meet clients' needs, delivering an enjoyable and memorable experience.

Brand Expression

Brand Touchpoints

Brand expression supports brand recognition, brings clarity to business offerings, guides the client experience and nurtures loyalty.



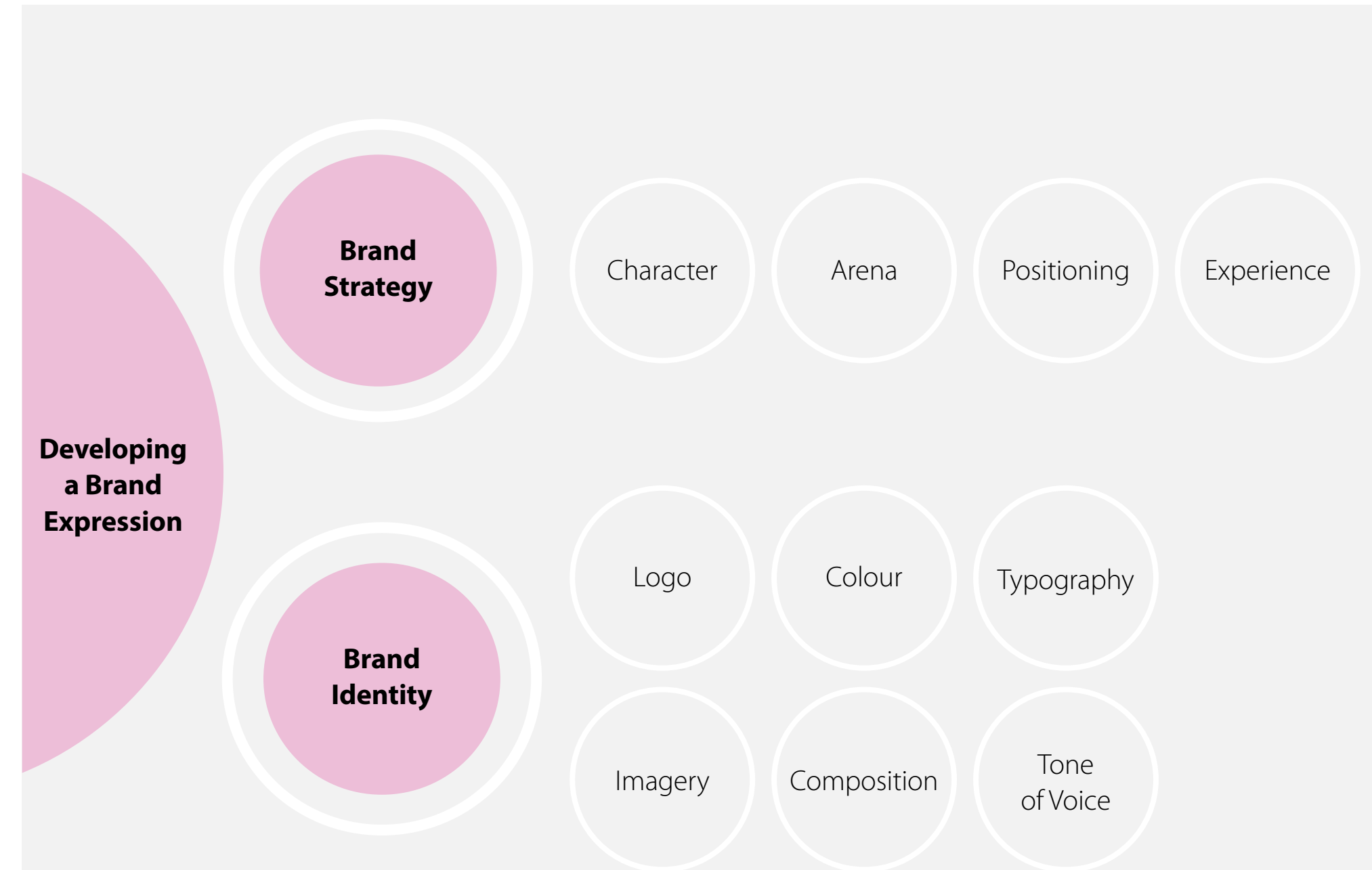
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Developing a Brand Expression

A brand expression should establish a unique position in the market – a position that resonates with both current clients and prospects, influencing choices and driving retention.

Crafting an effective brand expression begins with strategic business insights and carefully selected elements of a brand's identity. First, take a deep dive to explore the character of the business, identify the market it intends to compete in, and decide on an approach that will appeal to its target audience. Next, articulate the brand experience – what's the brand story? Taking these steps now will help you make more informed decisions later.

Once you have a clear understanding of what your brand will represent for your clients and where your business will be positioned relative to your competitors, it's time to get started. You can now confidently begin to create a package of visual, verbal and tactile elements for your brand – the brand identity.



Brand or Re-Brand

Developing a brand expression is an essential part of defining a new brand. But this process can also be applied to re-branding. While a new brand will require a new brand expression, re-branding may utilize existing brand elements (a logo, for example) without altering them.



Components of a Brand Identity



Logo

Your audience may be able to remember your logo before they fully understand your business offerings.

Tone of Voice

Funny, thoughtful, formal, playful – find a compelling voice for your brand that connects with your audience.



Colour

A business can stake its claim to a market position by "owning" a colour in consumers' minds.

Imagery

Give a visual context for the story you want to tell. Associate your brand story with unforgettable imagery.



Typography

Thin or bold, cursive or geometric, a distinctive font can help convey the unique character of your brand.

Composition

If you hid the logo, could a web banner or a poster be recognized as an expression of your brand? Create graphic devices that expand your brand recognition.

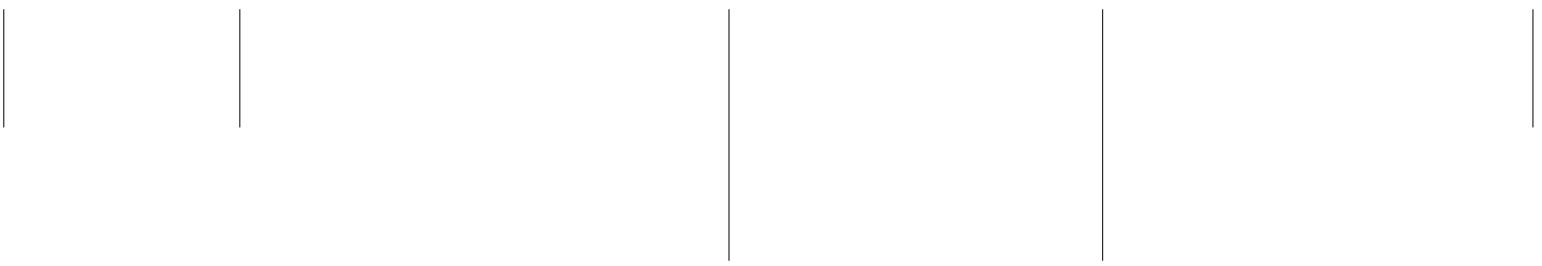


Strategic Branding Helps Your Business

When you align creativity and design with your business strategy, you're on your way to achieving your business objectives. That's what Strategic Branding is all about.

This alignment helps ensure your brand expression will lead to the right outcome – positioning your business for success.

Our approach to Strategic Branding at CASCO takes you and your business on a journey that's engaging, insightful and informative, and equips you with solutions that can help you reach your business goals.



1. Discover Begin by identifying any current business challenges. Has your brand become static and ineffective, putting you at a disadvantage when compared to competitors? Do you need to respond to economic shifts in the market? Are there untapped business opportunities out there? Step back, look within, listen to stakeholders. Build consensus – and then define attainable business objectives and goals.

2. Define With new insights in hand, set out the foundational principles of your brand. These should be actionable, compelling and truthful. A carefully crafted brand character will keep you grounded. Need to attract new talent? Entering a new market? Strategic brand principles will help you articulate your value proposition and shape your clients' experience.

3. Create At this stage, you will be able to rely on a brand strategy to ensure that every design decision is an informed decision. Your brand now has a clear and compelling voice, which will help you craft creative solutions for the other components of your brand identity – logo, colour, typography, imagery and composition. This new brand expression should support brand recognition, bring clarity to business offerings, guide the client experience and nurture loyalty.

4. Activate Once your brand is aligned with your business objectives, marketing initiatives and revenue priorities, you're ready to take action. It's time to power up your brand touchpoints and take your brand to market in a timely and confident manner – creating an impact that will energize your business.



Essential Strategic Branding Principles

Strategic Branding Principles to Elevate Your Brand

As we were saying, a brand is not a logo, it's the expression of a reputation. Your brand's expression is the way people – consumers, current clients and prospects – get to know you, think about your business, choose your services or products,

and develop loyalty to your business. Here are five essential Strategic Branding principles that can elevate your brand profile and position in the market.

1 **Align design and creativity with your business strategy**

Creating a brand expression that aligns with your business strategy will help you achieve your business objectives. For example: If there is an opportunity to tap into a younger demographic, your brand must be expressed in ways that appeal to that audience. What are they interested in? How can they find out about your business?

2 **Key messaging is key!**

Find a compelling voice for your brand. Does your messaging resonate with your audience? Will they relate to your brand story? Does it inspire them to identify with you, to be part of your story? Craft messaging that's genuine, truthful and relatable.

3 **Design a logo that's memorable**

Your logo is what most of your clients will remember. Make it meaningful in unique ways so that it reveals your brand's character. Simplicity is vital – the best logos are the ones you can draw in the sand.

4 **Stake your claim to a position in the market with colour**

Differentiate your business – or align it with your market – using colour. For example: Does your business offer financial services? Do your competitors feature blue in their visual identity? You have two choices: You can use blue to align your business with that market. Or you can select another colour to differentiate your business and position it strategically within that market.

5 **Execute based on business objectives**

Yes, it can be gratifying to have your team flashing thick business cards. But how are potential new clients actually coming in contact with your brand these days? Maybe investing in an improved web presence should be a higher priority. A website that effectively expresses your brand can help increase awareness of your business – and with the right digital tools in place, it can help you win new clients.





Diego Casco, Creative Director

As founder and creative director of CASCO, Diego brings his creative and strategic expertise, acquired over more than two decades, to every client project to ensure effective results. Diego's professional and business experience has helped him develop a client roster that includes corporations, government agencies, not-for-profit organizations, and small to medium-sized businesses. He understands the current business environment and how to identify opportunities for growth through strategic branding.

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“Creative thinker, dedicated to brand development, with a knack for distilling your business into a unique brand expression.”

Put Strategic Branding to work for you.

Your brand is an asset –
start investing in it.

At CASCO, we'll work closely with you. Let's start by creating a Strategic Branding plan that will help you achieve your business objectives. By taking a deep dive together, we will be able to identify your business needs and discover opportunities for growth.

Our goal: Positioning your business to engage and captivate your audience, and creating an actionable brand expression that will yield business results.

If you would like more information on Strategic Branding or our services, please contact Diego Casco at diego@casco.agency, or call us at 416.921.0082

CASCO, a Strategic Branding agency.



www.casco.agency

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