

BRANDING

The checklist for rebranding

A step-by-step checklist for a smooth brand transition

Table of contents

03	Introduction: Importance, reasons and types
09	Checklist overview
10	Checklist 1: Involving the necessary people
12	Checklist 2: Planning and preparation
15	Checklist 3: Brand strategy
16	Checklist 4: External implementation
18	Checklist 5: Internal updates
20	Checklist 6: Internal updates continued
22	Launch time
23	Expert opinion
25	Conclusion

The unique ability of rebranding

Rebranding is a challenging time for any organization and this guide aims to make it easier to undergo the rebrand process and get the most out of your rebrand.



Rebranding is an important step for organizations who want to remain relevant to their market, offer a distinction from new competition, or support their product's evolution.

Even though it's a smart step, the process of rebranding can be daunting – it involves a huge amount of work and is a very visible change, which can backfire if it doesn't succeed. The rebrand process also involves a large number of people and requires input from many different parts of your organization.

We've created this rebranding guide to help when considering the challenge of starting a rebrand. It discusses the reasons for rebranding, the different types of rebranding, and the elements that must be considered when rebranding, before presenting a checklist of the steps to follow in the rebranding process.

Although the rebranding process will look different for every company and there is no rebranding structure which fits everyone, following these main points as you go will ensure your rebrand is happening for the right reasons with the relevant stakeholders involved, and all the new brand elements will be successfully implemented and utilized.

The importance of branding

Branding is a key tool which organizations use to tell their story and reflect it across every part of their visual identity.

Before beginning the rebranding process, it's important to understand why branding is important for an organization. Knowing the role which branding plays and the benefit a strong brand provides aids the understanding of why rebranding is important.

The brand is the experience and environment created around the product or service that your organization offers – it's how this is marketed, how it appears visually, and the surrounding experience which is offered to the customer throughout their journey. It is how one organization is distinguished from another.

Brand is also important internally, as how the organization has chosen to frame itself relates to internal values and behavior, as well as external.

Features of a brand include:

- ✓ **Visual identity**
- ✓ **Values, mission and vision**
- ✓ **Customer experience**
- ✓ **Product or service**
- ✓ **Communication**
- ✓ **Employee branding**

All of the above elements must be aligned into one clear story and fit with each other for the brand to be effective.

"Forbes research found consistent branding across all channels increases revenue by 23%"

- Forbes, 2018



"Consistent usage of on-brand templates and content improves brand perception."

- Forrester, 2019

Reasons for rebranding

Rebranding isn't always a good idea – ensure you have a clear understanding of why your organization is doing it before you begin.

It's vital to know why you are rebranding before you begin the process, as this will help direct the whole rebranding process. There are multiple reasons for deciding to rebrand, including:

1. Organizational change

To reflect an organizational change, or a new structure within your organization.

2. New market placement

Your organization has evolved to suit a different market need, or the range of products or services has changed.

3. Competition

If new competitors have appeared in the market, and there is now a need to distinguish between what they offer and what you offer.

4. Acquisitions and mergers

A new identity is needed to reflect this change and the range of services or products offered.

5. Values

Defining, or redefining, the values and mission of the organization often requires a rebrand to reflect this.

All of the above are situations which mean an organization can optimize their new services, structure or position through a rebrand.

However, there are also reasons for rebranding which are insufficient, and should not cause a rebrand. These include a brand strategy not having results, an attempt to cover up a crisis, or being bored by the current brand and wanting more attention. Rebranding for these reasons is not a good idea. Instead, the brand strategy and assets should be addressed, to consider how branding could be done more effectively.

Which type of rebrand is appropriate?

It's important to differentiate between whether a partial rebrand or a full rebrand is needed, as this impacts what the rebrand involves.

There are two main types of rebrand: a partial rebrand or brand refresh, and a full rebrand. A partial rebrand can be seen as an evolution of the brand, whereas a full one is more of a revolution.

It's important to choose the type of rebrand based on the requirements and needs of your organization, rather than choosing the type which looks like less work, or will have the most impressive-looking results.

If you need to make visual changes to your organization and adapt your product or services to a changing marketplace while maintaining the main ethos of the organization, then a brand refresh is the appropriate way to go.

Brand refreshes, or partial rebrands, are often very visual and update the identity to optimize the brand for where it wants to be – refreshes can be seen as an evolution of what your brand currently offers.

A full rebrand is a better choice if your organization has undergone a merger or acquired a new company and you need to create a new identity, or if your product or service has changed, or if there has been a change in the structure or intention of the organization.

Even though the types of rebrand differ, it's important to be clear about which type your organization needs, and consider how the different elements of rebranding relate to it.



Elements to consider before beginning the rebrand

Rebrands consist of a both a strategy and a practical implementation; make sure both are thought through from the beginning.

Before starting the rebrand process, you should be aware of what you wish to achieve from the rebrand and have an idea of the visual direction. Having a clear understanding of which elements need consideration from the beginning prevents anything being missed out and allows you to pitch the project to stakeholders more successfully.

There are two main areas to consider when rebranding – firstly, the reasons behind the rebrand and the strategy, and secondly, the implementation of this strategy. As a rebrand is a strategic decision, it is vital to understand the reason behind it. A successful rebrand strategy will be built on understanding of:

1. Why the rebrand is happening.
2. What market the rebrand is targeting.
3. Whether the audience will remain the same.
4. How the rebrand reflects the organization's values, mission and vision.
5. What the new identity represents.
6. How the rebrand fits with the overall growth plans of the organization.

Once you have ideas for the strategic reasoning, the more practical elements that will need to occur during the rebrand should be considered. It's important to make an inventory of every place where your brand is visible, and ensure you will have budget and means to change these, if necessary. Elements to consider at this preliminary stage include:

- ✓ The logo
- ✓ Brand slogan and key messaging
- ✓ Colors used
- ✓ Fonts used
- ✓ Other main visual features
- ✓ Website
- ✓ Physical marketing collateral
- ✓ Internal branding

Checklist overview

- ✓ 1 Involving the necessary people
- ✓ 2 Planning and preparation
- ✓ 3 Brand strategy
- ✓ 4 External implementation
- ✓ 5 Internal updates
- ✓ 6 Internal updates continued

Checklist 1

Involving the necessary people

A rebrand involves a variety of people across the organization, as multiple viewpoints need to be considered for an effective rebrand.



Once you have considered the above factors, and decided to go through with the rebrand, the first step is to ensure the right people are involved.

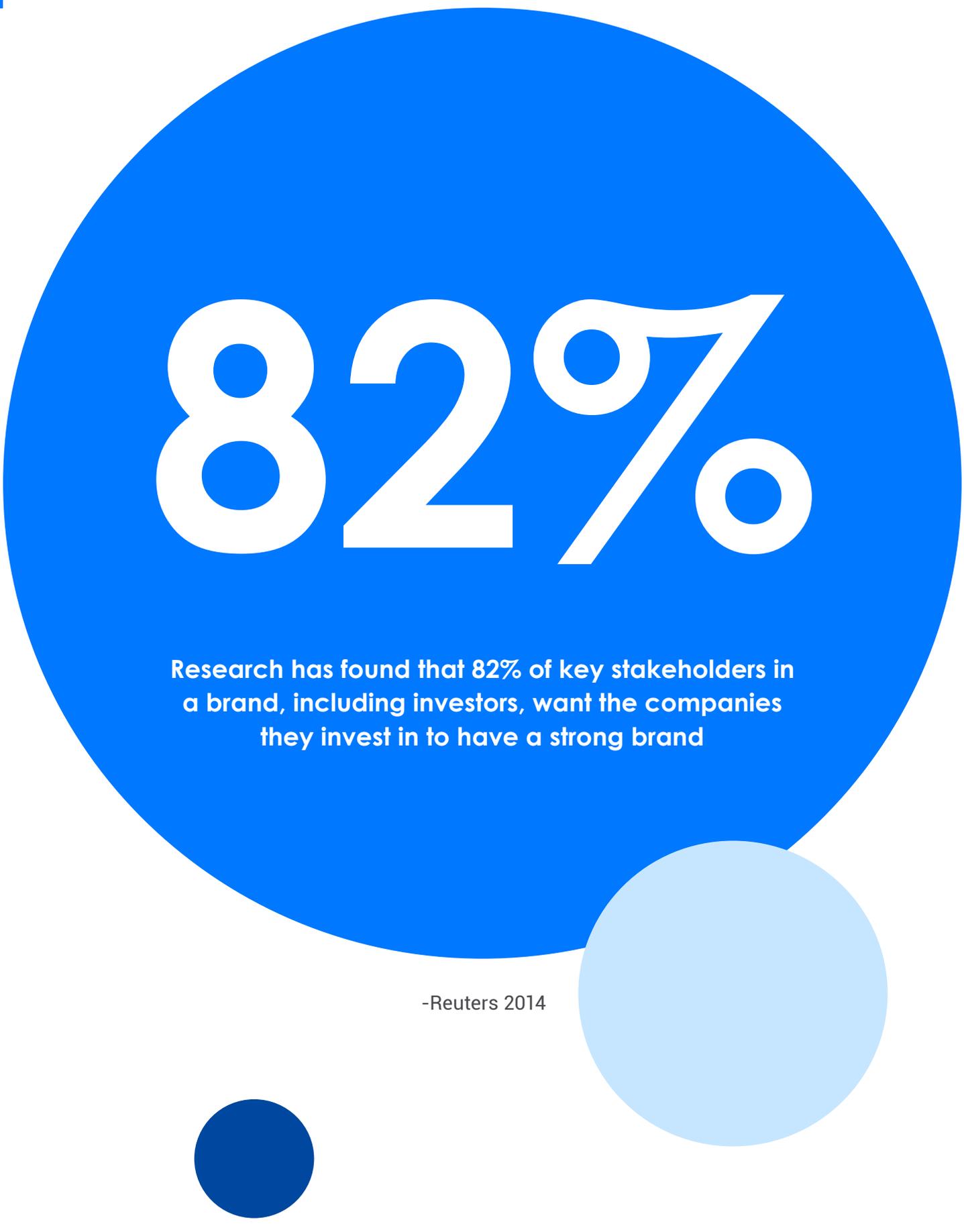
There may already be a key rebrand team created, consisting of members of senior management, HR, an internal or external brand strategist, and marketing, communication and creative team members.

Although these may be the core members of a rebranding team, they're not the only people who matter in this decision. In order to secure organization-wide buy-in, it's vital that every team

is represented, as this will offer necessary viewpoints, and ensure the implications for every part of the business are considered.

Although you may not consider your salespeople as being key to the rebranding process, they are the ones who are aware of how prospects will react to a new brand, and which key elements should remain. Similarly, a customer support team will be aware of any potential difficulties or queries that existing customers will have, and know best how to address these concerns.

And of course, the rebrand will also have internal implications, so it's important that there is at least one representative from each department on-board to help with this. Depending on the size and structure of your organization, remember to include people from other office locations and any important stakeholders or trustees. This isn't to say that all of these individuals need a say in every meeting and decision, but their feedback on major decisions should be considered.



82%

Research has found that 82% of key stakeholders in a brand, including investors, want the companies they invest in to have a strong brand

-Reuters 2014

Checklist 2

Planning and preparation

The planning stage of a rebrand sets the direction and key points for what will be needed later in the process.



The rebrand process involves many stages, so it's important to plan out a timeline for the progression of the main steps.

Once the correct people are involved, the planning can begin. It's important to make sure that you have the financial backing before you begin and are aware of the cost of the process.

Firstly, discussions should be underway surrounding the reasoning behind the rebrand, and how this is going to be implemented. Be prepared to firstly spend a long time discussing the different perspectives relating to the key areas of the rebrand. There is no right decision to

make in any case, but it's important that as many perspectives as possible are considered, and that anything decided on must be directly related to the reasoning behind the rebrand.

Name: It is often not necessary to come up with a new name, but it may be needed, particularly if the rebrand is the result of a merger. Finding a name can be difficult, so ensure you involve as many people as possible, and check that there are no existing domains, trademarks, or social media handles. 72% of the best brands have names which are made up words or acronyms, so it's worth taking the time to come up with something unique that really encapsulates the brand.

Timeline, budget and system: Map out the milestones and deadlines – it might be helpful to use planning software and budget tracking tools to ensure that everyone is always up to date on what is happening, and can easily collaborate. Make sure to not underestimate the costs of implementation, as this can cause difficulties later on.

Checklist 2

Visual Identity: It's likely that at least some key visual elements will change – perhaps a new font is being implemented which is more fitting to your new personality, or the logo has been updated. It's important to be extra careful with visual elements as they are so recognizable, and the reaction to visual elements is often the strongest reaction from customers, so take as much feedback on board as you can before the final decision.

Website: Almost every rebrand will mean changes to your website are required. Nothing looks worse than a half-updated website, so it's important to make sure that all the updated assets will be implemented at the same time – either block the website until the launch, or make sure it is inaccessible from search engines until everything is ready.

Style guide: Creating a style guide at this stage is important – it means that everyone is aligned on the guidelines for content and communication, both now and after the rebrand has happened.

Style guides are also helpful for new employees, who will then have a clear understanding of how to present and style their communication, which logos to use and the brand tone of voice, amongst other things. Style guides can also be a useful arena to justify why choices have been made, for example why the tone of voice is as it is, and how this relates to the overall brand message. Tools like Frontify can be helpful to store this information and provide access to it.

Another added benefit is that brand guidelines are more likely to be adhered to when they are clearly spelled out. If employees are not sure what the new brand guidelines are or what has changed, they may default to old ways which can look inconsistent and potentially harm the brand.

Style guidelines are also an excellent place to make sure you have covered all types of communication and format in the rebrand. For example, you may know how the new brand will look on a desktop or laptop, but have you considered how this will be optimized for mobile? Being able to create a list and rules for every type of communication minimizes the risk of anything being missed out.



25%

Only 25% of brands actually stick to their brand guidelines

- Venngage 2019

Checklist 3

Brand strategy

A strong rebrand is based off a well-thought through brand strategy that reflects the direction you want your brand to develop in.

With a rebrand comes a necessity for a new or updated brand strategy – you can't continue with the same brand strategy when the brand itself has changed.

Knowing the brand strategy will help you focus on the direction in which you want the rebrand to go and create goals to ensure that brand targets are being met. Strategy is vital for ensuring the positioning of your brand, and utilizing the correct channels for marketing and promotion purposes. Having a strong brand strategy will ensure that the rebrand is used effectively – if your plan is to

reposition yourselves in a new market, then the brand strategy will help achieve that, whereas it if it to show the development of a wider range of services, a brand strategy will also help communicate that. Focus on what the need behind the rebrand is, and then explore how your brand strategy can help enhance this.

A brand strategy will impact parts of marketing such as your SEO focus and goals, and any advertising which you do. It's important to involve the team members who work in these areas to ensure the strategy is achievable and measurable.

A brand strategy is "a plan for the systematic development of brand in alignment with a business strategy."

- Column five media, 2018

Checklist 4

External implementation

To implement your rebrand, external elements must be updated accordingly.

A large part of a rebrand is ensuring that all the visual assets are updated. There are several practical steps to ensure that the visual aspects of the rebrand are successfully implemented and everything is aligned. In a digital era, much of this is related to the digital presence, and the following are key to update:

If you are redirecting your webpage, create a list of old URLs and ensure every single one is directed to a new page.

Revise metadata on web pages where it's needed, for example page titles, page descriptions and image tags. All of this is important for your SEO ranking, and will help deliver your new brand strategy.

Update social media profiles, handles and URLs – or go one step further and post a status or update about why the rebrand is happening, and what it means for customers.

Consider the administrative updates that are necessary if there has been a name change, such as any necessary permits, business accounts, bank accounts, credit cards, HR records, payroll, etc. This stage is quite admin intensive, but vital to ensure that everything has been correctly updated.

Marketing collateral is a key external factor to update – consider business cards, signs, banners and displays, and stationary. Depending on what your organization offers, updating media kits, product packaging, posters, adverts and other promotional material may be necessary.

10 channels

**An average consumer uses 10 different
channels to interact with companies**

-Salesforce 2018

Checklist 5

Internal updates

Internal updates are as important as external ones and must be a key consideration during the rebrand.

Internal updates can often take a backseat to external ones, but they're the most important tool for getting all employees onboard with the rebrand and aware of its importance.

If the internal updates are not implemented effectively, then employees will not feel involved in the rebrand, and will be unsure about whether it has been completed.

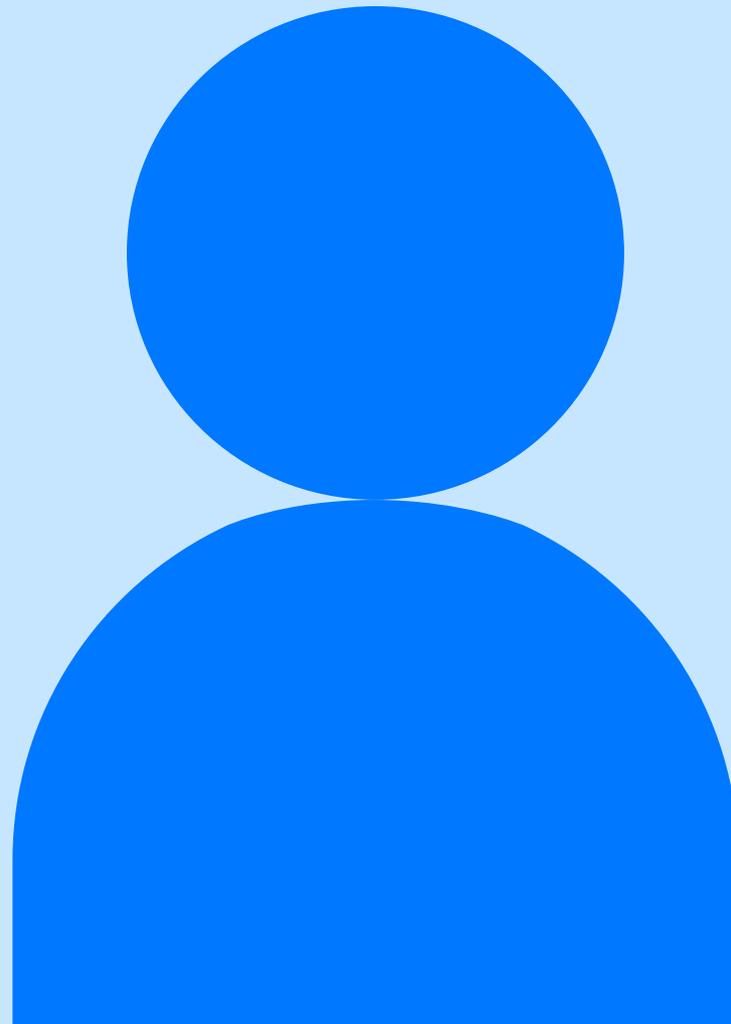
A good place to start is ensuring the necessary office equipment bears the correct branding, such as envelopes, labels, return address labels and stamps.

As most employees in enterprise organizations do the majority of their work in digital form, all internal forms of communication need updating to fit with the updated brand.

Some of the digital elements which require updating to reflect the new identity include:

- 1. Email signatures, and the information which they include.**
- 2. Intranets, or information on internal websites.**
- 3. Internal documents, which cover a wide range of areas such as contracts, forms, invoices, receipts and presentations.**
- 4. Digital assets, such as logos and company images.**

Remember the importance of employee branding, and ensure your rebrand is matched by how employees are treated as part of the organization and how it is promoted when seeking new employees – the more aligned these are, the stronger the brand will be.



**Employees with a strong employer brand
see the cost of hiring decrease by 43%**

- LinkedIn 2015

Checklist 6

Internal updates continued

Updating documents, templates and assets is an important step as this allows an internal and external reflection of the new brand.

The required internal updates can be incredibly time consuming, as there are so many documents to update, and the involvement of IT teams is required. Software is a way in which this process can happen in a quicker manner.

Templafy's template management system allows your organization to manage, dynamically update, and share business document templates and brand assets. It's a solution that communications and compliance teams can control, IT can trust, and which supports employees during every step of on-brand document creation.

As Templafy opens in a task pane in document creation applications, such as Office, employees will always be able to access the latest company content. Post rebrand, this means that they won't struggle to find updated images, icons or templates, and instead find and use them immediately, regardless of device or location.

For brand managers, this means security in knowing that they have provided all employees with the correct access to assets after a rebrand, so the content created is guaranteed to reflect the new brand identity.





"In the light of our brand relaunch, the updates of core visual assets in Microsoft Office templates were key."

- Coloplast

Launch time

Launching your rebrand effectively contributes to the success of the project, meaning you should prepare well for the launch too.

When everything has been prepared, considered, discussed and rolled out, then it's time for the launch of the rebrand.

This is an excellent time for spreading awareness, but also celebrating the hard work that has been done, and the direction which the brand has moved in. Follow these steps to ensure you make the most of the launch:

Blog about it; explain to anyone and everyone why you have rebranded, and what the priorities are. Make sure that you're clear about what this means for clients and stakeholders, in order to minimize confusion and enhance success.

Talk about it on social media, and make sure this is monitored so confusion and questions that may arise can be easily addressed. Make sure that you don't just mention this once on social media but continue talking about your brand relevance and priorities.

Another idea could be to publish a post on the history of your brand, and why it is not changing, what the move signifies, and what the hopes are for this.

Encourage your staff to share the news in professional networks, and offer a template for social media posts that they can share to ensure internal uptake, and as much communication as possible.

Plan launch events and parties – it's time to celebrate, and also let all the relevant people know this is a cause for celebration and an exciting new stage of the organization's journey.

Expert opinion

Expert interview: Maarten Evertzen, Head of Digital



What's the most important thing to consider when you're planning a rebrand?

"The most important thing when considering a rebrand is to conduct a financial evaluation with a subject matter specialist to gather and specify the current state of brand management and what all the touchpoints and processes are, versus the desired rebrand scenario. Then you are actually able to identify financial impact, both in investment, ROI, and different ambition level scenarios.

For every dollar you spend on design, you spend 20 on implementation – as just one example, people think print is obsolete, but a company sending communications and information by mail can use thousands of envelopes a year. If you move from a two-tone logo to a dynamic full-color logo, you could pay up to 70% more, so that's also worth considering. There's many cases of brand touch point categories similar to this which need consideration."

What are the main pitfalls of rebranding?

"Underestimation. The average timing for a rebrand is every 7-8 years, and if there hasn't been one for a while, a lot of the oversight of brand touch points and project management history is lost. So a lot of the time we encounter an underestimation of properly scoping and executing a rebrand programme. A rebrand is not just a logo swap, it affects more than symbolism alone, such as tone of voice and

Expert opinion

even behavioral aspects of the company. Mostly people are often only aware of the tip of the iceberg of what a rebrand contains. A rebrand is like every vessel in your body – it impacts every part of your business and nothing can be left out. It makes sense to do a really good inventory of everywhere your brand is before you begin, so then you know you've covering everything. After that, start prioritizing based on visibility and complexity of the specific touchpoints.

Another common pitfall is the difficulty between Marketing and Corporate Communications. Communications can be really strict and directive with branding, but on the other hand, marketing run the risk of hyper-adaptation of the brand to every trigger in the market. This often happens with things such as UX design and A/B testing – it's not enough that something works, it has to be there for a reason and contribute to the purpose. Form always follows function, and design without functionality runs the risk of making it difficult to use branding. Manage the balance here is key. “

What role does software play in rebranding?

“Software can help automate a lot of design in functionality, and help with the combination of function and design. It also works to help roll out templates in digital forms, whether that's document templates, or landing pages. Software is a way in which design can be easily implemented. This isn't only true for after a rebrand, but also helps with the facilitating and running of a brand on a daily basis – software makes it easy, and means you can't do anything wrong in terms of design. – software makes it easy, and mans you can't do anything wrong in terms of design.”

Conclusion

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Rebrands provide huge value and many more opportunities for your organization, allowing your brand to reach its full potential.

Undertaking a rebrand is a necessary step for an organization that wants to best serve its customers and stay relevant to an ever-changing marketplace.

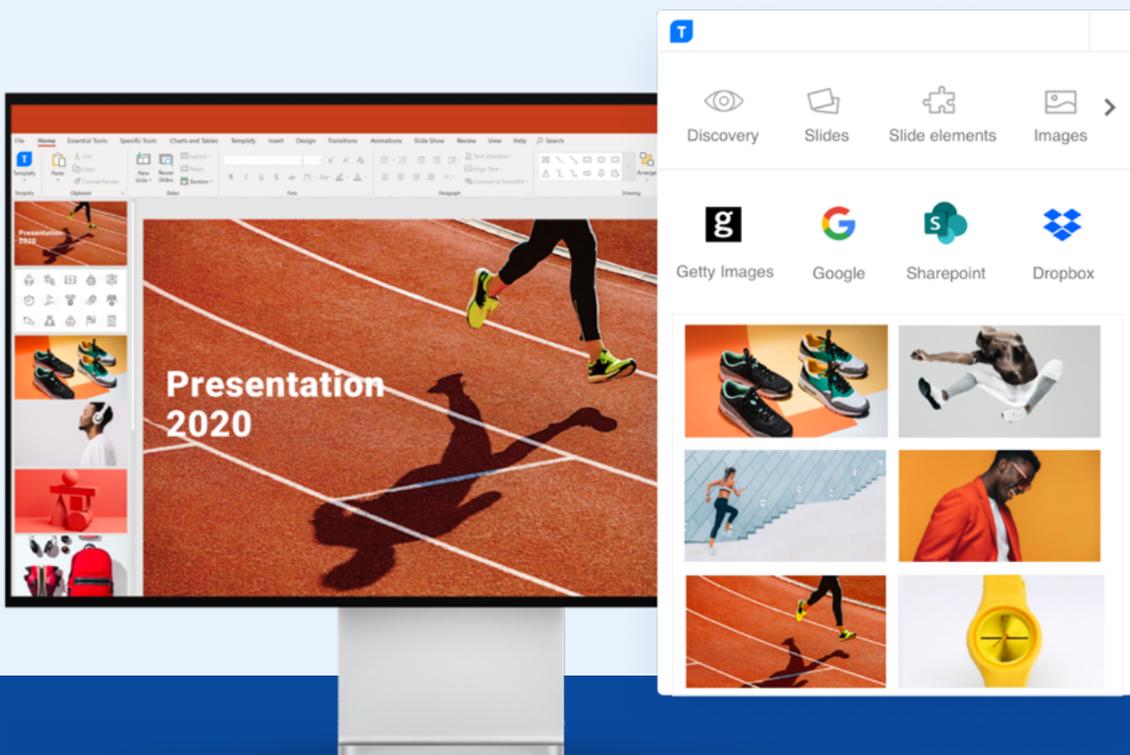
Although it can be a daunting task to plan a rebrand, doing this effectively will pay off with a smooth, aligned process across the organization, and the ability to move your brand into the area where you want it to be. And once your brand is occupying this new space, the results will be powerful.

Rebrands move your brand and organization into an exciting new phase, and we wish you the best of luck with the journey.



Let Templafy help you make the most of your rebrand

Get started



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Learn more at templafy.com