

# Creating a brand playbook

## Cheat sheet

A brand playbook, sometimes referred to as a set of brand guidelines, is a document that brings together all the information about your brand and visual identity in one detailed document.

### What are the benefits of having a brand playbook?

A brand playbook will:

- ensure you have a consolidated, central source of information about your brand, vision, values and visual identity
- help your firm bring your brand to life consistently across all touchpoints, and preserve the integrity of your brand over time and across channels
- act as a simple, central reference point for both internal and external stakeholders responsible for bringing your brand to life
- be used in full or in part to train your current team, and can also be used when you onboard new team members to help them understand your competitive positioning.

### Top tips for building a brand playbook

- **Include information about your firm and your identity:** A brand playbook is more than just a guide to using your logo and colour palettes. Include information about your firm's vision, purpose and brand positioning as well, to build a comprehensive overview of the firm.
- **Introduce it to your team:** Launch the playbook to your team, and use it when you're onboarding new team members. Make sure it's stored centrally so everyone can find it easily.
- **Keep it fresh:** Update your brand playbook regularly to make sure it's an up-to-date representation of both your brand and your marketing collateral.

### What should go in a brand playbook?

A brand playbook is more than just a description of your logo and colour palette. A comprehensive brand playbook should include the below, where applicable.

- **A summary of the purpose of the brand playbook**
- **An introduction to your firm:** A high-level summary of your goals, strategy, vision, purpose and values.
- **Your competitive positioning and messaging pillars:** Here you may also choose to include your company elevator pitch.
- **Information about your target audience:** Include your target audience personas (if you have them) or target segments – alternatively, include a succinct summary of any information you have about your target audiences.
- **Your tone of voice (if you have one)**
- **Your tagline (if you have one)**
- **Your logo**
- **Your visual identity:** This can include your colour palette, fonts, image style, any design devices you use as part of your identity. If you're part of any joint ventures, guidelines for co-branding should also be included here. You

can also include a guide to things like PowerPoint chart and graph styles, an icon library, examples of what to do and what not to do, and more.

- **Collateral examples:** This can be quite simple, or very detailed, depending on the needs of your firm. Some common inclusions are specifications and examples of your company stationery, standard email signature, your corporate brochure and welcome kit, your company website and any other collateral examples you can use to demonstrate the best-practice approach to bringing your brand to life.
- **Contact details:** Include the details of the person who can be contacted if a stakeholder has any questions about the brand or content in the brand guidelines.

## Building a brand playbook

You can develop your brand guidelines internally, however it can be valuable to engage a professional copywriter and designer to work with you to ensure your brand is presented as professionally and comprehensively as possible.

The brand playbook will typically have two halves.

**Your firm overview:** an introduction to your firm; and your competitive positioning and messaging pillars.

**Your logo, tone of voice and visual identity:** the remainder of the more marketing-focused information about your brand.

Some firms choose to turn the firm overview into a separate piece of promotional collateral – a short flyer or fold-out card for employees that succinctly and creatively communicates the essence of your firm.

A brand playbook should be a dynamic document that is updated regularly as the brand evolves. Keep it fresh by adding new collateral examples and imagery as they are developed.

## How will you use your brand playbook?

Once you've developed your brand playbook:

- share it with all your external marketing partners as part of your initial briefing process
- save it centrally so that all members of your team can access it if they need to
- launch it to your team, and explain its use and benefits
- identify specific team members who should receive more detailed training in the use of the brand guidelines. For example, if you have support staff responsible for sponsorship and events, they'll need training to understand how the guidelines should be used to make sure you are applying the brand correctly as part of sponsorships and in event collateral
- work with your HR team to identify how best to use it as part of the new client onboarding process.

## For more information contact

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