

# Brand Building for Small Business — Workbook

This workbook turns the course into a finished brand you can use this month. Work through it in order: lock your positioning, archetype, and personality, build a budget-friendly visual identity, write your messaging house and tone of voice, then audit every touchpoint and compile a one-page brand guideline. Use the templates to define your colors and fonts, plan your messaging house, and run a touchpoint consistency audit so your brand looks and sounds the same everywhere.

## Positioning: Claiming a Place in the Customer's Mind

Define the specific position you can own, the archetype that gives you a recognizable character, and the personality traits that guide every brand decision.

### Worksheet: Write Your Positioning Statement

Fill in each blank using the Geoffrey Moore template. Be specific in every field. If you write everyone, better quality, or great service, the position is too weak, redo it with concrete words you can defend today.

Target customer (specific, e.g. busy professionals in Austin who want dinner without cooking)

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Their key need or opportunity (the problem you solve)

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Your brand name

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Your category (what kind of thing you are, e.g. weekly meal service)

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Key benefit / reason to buy (one core, concrete benefit)

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Primary competitive alternative (who they would otherwise choose)

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Your key differentiation (how you are clearly different and better)

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Full statement assembled into one sentence

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### Exercise: Map Your Category and Find the Gap

Draw a positioning map with two axes that matter to your buyers (e.g. budget-to-premium and functional-to-indulgent). Plot yourself and 3 to 5 real competitors, then answer the prompts to find an empty, credible space you can claim.

- Which two axes best capture what your customers actually care about when choosing?

- Where do your competitors cluster, and which corners are crowded (price wars) versus empty?

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- Which empty or under-served space could you credibly own today, not aspirationally?
- Pressure-test it: is it true now, different from rivals, something customers pay for, defensible, and focused?

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### Worksheet: Choose Archetype and Define Personality

Pick one primary archetype (about 70 percent of your personality) and optionally one secondary (about 30 percent). Then turn it into concrete traits and behaviors your team can act on.

Primary archetype (e.g. Caregiver, Explorer, Sage, Hero) and why it fits

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Secondary archetype, if any, and the nuance it adds

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Three to five personality traits (e.g. warm, knowledgeable, gentle)

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Three behaviors that follow from the archetype (e.g. reply within hours, no fear-based upsells)

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Three things your brand would never do (off-archetype behaviors to avoid)

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### Checklist: Positioning Foundations Complete

- Positioning statement written with every blank specific and defensible
- Positioning map drawn with at least 3 real competitors plotted
- An empty, credible space identified that you can own today
- One primary archetype chosen (plus optional secondary)
- Three to five personality traits defined
- Personality translated into concrete do and do-not behaviors

### Visual Identity on a Small-Business Budget

Build a distinctive, reusable visual system, logo, color, type, and imagery, using affordable tools and proven rules so your brand is instantly recognizable.

### Worksheet: Write Your Logo Brief

Complete this one-page brief before you make or commission a logo. Hand it to a DIY tool, a Fiverr/Upwork freelancer, or a studio. It produces a usable result far faster than asking for a nice logo.

Positioning and archetype in one line (the feeling to hit)

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Three adjectives the mark should convey

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Three adjectives or styles the mark must avoid

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Where it appears most (sign, Instagram avatar, packaging, vehicle, invoice)

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Two or three reference brands you admire and why

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Required deliverables: primary lockup, icon, wordmark, color + black + white versions, vector (SVG/AI/EPS) + transparent PNGs

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## Exercise: Build a 60-30-10 Palette

Use Colors.co or Adobe Color to assemble a palette by role, not by picking pretty colors. Then assign the 60-30-10 split and record exact values so colors never drift.

- What broad association should your primary color signal (e.g. blue=trust, green=natural, black=premium) and does it fit your audience?

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- Which color is your 60 percent dominant (often a neutral/background), your 30 percent secondary, and your 10 percent accent for buttons and prices?

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- Did you record HEX, RGB, and CMYK for each color (plus a Pantone if you will print signage or packaging)?

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- Does your body text meet WCAG AA contrast (4.5 to 1) against its background when checked in WebAIM Contrast Checker?

## Worksheet: Pick a Type Pairing and Imagery Rule

Choose one heading font and one body font (Google Fonts is free and professional), then define a single imagery style so every asset looks cohesive.

Heading font (and why it matches your archetype: serif=traditional, sans=modern, etc.)

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Body font (highly readable, at least 16px on web) and a web-safe fallback

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Defined sizes for heading, subheading, and body

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One-line imagery rule (e.g. bright natural light, real people, no posed stock handshakes)

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Graphic treatment decision (flat icons in brand color OR line illustrations, not a mix)

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Three to five reusable Canva templates to create (e.g. Instagram post, story, quote card)

## Checklist: Visual Identity System Ready

- [ ] Logo delivered as a system: primary lockup, icon, wordmark, and color + mono versions
- [ ] Vector files (SVG/AI/EPS) and transparent PNGs saved in a shared asset folder
- [ ] Logo tested at large size and at 32x32 pixels and still readable
- [ ] Palette assigned by role with the 60-30-10 split and exact HEX/RGB/CMYK recorded
- [ ] Body-text contrast checked against WCAG AA (4.5 to 1)
- [ ] Heading and body fonts chosen, sizes defined, web-safe fallback noted
- [ ] One imagery style defined and example images collected
- [ ] Logo, colors, and fonts saved into a Canva Brand Kit or Figma library

## Messaging and Tone of Voice

Build a messaging house, a tagline and value propositions, a documented tone of voice, and a brand story so every word sounds unmistakably like you.

### Worksheet: Build Your Messaging House

Fill the three levels of the house. The roof is one core promise, the pillars are 3 to 4 themes you want to be known for, and the foundation is the proof that makes each claim believable. Use the so what test to push every feature to a real human benefit.

Roof: your single core message / brand promise (one sentence)

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Pillar 1 and its proof points (features, facts, stories)

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Pillar 2 and its proof points

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Pillar 3 (and optional Pillar 4) and its proof points

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Tagline: short, memorable, public expression of the roof

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Primary value proposition (who you help, what you do, why it is better), quantified where possible

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### Exercise: Define Tone of Voice with We Are / We Are Not

Pin down your voice with 3 to 5 we are / we are not pairs, then make it reproducible by rewriting real sentences the on-brand way next to the off-brand way.

- Write 3 to 5 we are / we are not pairs (e.g. encouraging, but not a cheerleader who ignores reality).
  - Take a real shipping or confirmation message and rewrite it the off-brand way and the on-brand way side by side.
  - Do the same for an apology or problem message, where tone flexes more serious while the voice stays the same.
  - What is one word you love (on-brand) and one word you ban (e.g. never say cheap, say affordable)?
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### Worksheet: Draft Your Brand Story

Fill in the five beats, making the customer the hero and your brand the guide (StoryBrand). Then note how you will reuse it at different lengths.

The problem: the frustration or gap customers face

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The spark: the moment or reason you started

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The belief: what you stand for

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How you are different: how you solve it differently

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The customer transformation: the better state you create

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Reuse plan: two-sentence bio version, founder paragraph, 30-second spoken version

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## Consistency, Guidelines, and Living the Brand

Audit every touchpoint, compile a one-page brand guideline, and set the routine that keeps the brand consistent as you grow.

### Exercise: Run a Touchpoint Consistency Audit

List every place a customer meets your brand, collect a real sample of each, lay them side by side, and find the inconsistencies that quietly erode trust.

- List every touchpoint from discovery to post-purchase (sign, packaging, website, social, email, invoice, voicemail, ads, vehicle).
- For each, check three things: same logo and colors, same fonts and visual style, same voice and message.
- Score each touchpoint on-brand, partly on-brand, or off-brand, and note exactly what is wrong.
- Which high-visibility, high-volume touchpoints will you fix first, and what is the single worst offender?

### Worksheet: Compile Your One-Page Brand Guideline

Pull all your decisions into a single reference (use a free Canva brand-guideline template, Figma, or a Notion page). Favor plain language and side-by-side examples over a pretty artifact.

Brand essentials: positioning statement, archetype, core values, messaging-house roof and pillars

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Logo: approved versions, clear-space and minimum-size rules, and a short do-not list

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Color: every color with HEX/RGB/CMYK and the 60-30-10 usage note

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Typography: heading and body fonts, sizes, and web-safe fallback

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Imagery: the style described, with two or three on-brand example images and what to avoid

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Voice and tone: the we are / we are not pairs plus two do/avoid writing examples

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Location of the master asset folder (logos, colors, fonts, templates)

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### Checklist: Brand Governance and Maintenance Set Up

- One person named as the brand owner who approves brand questions
- Locked Canva (or Figma) templates created so default output is on-brand
- Master asset folder set up with current logos, colors, fonts, and templates
- Brand guideline added to onboarding for anyone who touches customer-facing material
- A recurring quarterly 30-minute touchpoint audit scheduled
- A 15-minute brand sense-check step added before any new channel, campaign, or print batch

## Worksheet: Refresh-versus-Rebrand Decision

Before changing your identity, use this to decide whether you need a light refresh (keep recognition) or a full rebrand (resets recognition, expensive and risky). Most small businesses need a refresh.

What specifically feels wrong with the current brand (be concrete)?

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Is the reason a good one (audience/offering changed, looks dated, name causes real confusion) or a bad one (you are bored, a competitor changed, chasing a trend)?

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Would a refresh (modernized logo, refined palette, cleaner type) solve it while keeping recognition?

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If a full rebrand, what is the real, specific trigger and what is the cost of resetting recognition?

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Decision: refresh or rebrand, and the three changes you will actually make

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## Your Action Plan

1. Write your positioning statement with every blank specific, then choose one primary archetype and 3 to 5 personality traits.
2. Draw a positioning map with your real competitors and confirm the empty, credible space you will own.
3. Write a one-page logo brief and get a logo system delivered as vectors plus transparent PNGs (DIY tool, freelancer, or studio per budget).
4. Build a 60-30-10 color palette with exact HEX/RGB/CMYK values and a checked WCAG AA contrast for body text.
5. Choose one heading and one body font, define sizes, and write a single one-line imagery rule.
6. Save your logo, colors, and fonts into a Canva Brand Kit or Figma, and create 3 to 5 reusable templates.
7. Build your messaging house (roof, pillars, proof), then draft a tagline and one strong value proposition.
8. Write your tone of voice as we are / we are not pairs with two do/avoid examples, and draft your brand story with the customer as the hero.
9. Run a touchpoint audit across every customer contact point, score each, and fix the highest-visibility off-brand items first.
10. Compile a one-page brand guideline, name a brand owner, and schedule a quarterly 30-minute brand audit to prevent drift.











