

Brand Guidelines Creation — Workbook

This workbook turns the course into a finished brand guidelines document for one real brand. You will scope the right depth, write the logo system with clear space and minimum sizes, build a colour system with exact HEX, RGB, CMYK and Pantone values and AA contrast pairs, set a modular type scale, direct imagery and voice, and assemble both a PDF and a live Figma or Notion guide. Work through one section per module and finish with guidelines a team could follow without you, plus a one-page brand-at-a-glance summary.

What Brand Guidelines Are For

Decide the right scope, tier, and section structure for your brand before building a single page.

Exercise: Scope and Tier Decision Drill

Take three different brand briefs (for example a solo newsletter, a 30-person SaaS startup rebranding, and a national charity) and decide the right guidelines tier for each, justifying every call by who uses the brand and on how many surfaces.

- For each brief, count how many people inside and outside will use the brand without help, and list the surfaces it must work on.
- Choose a tier for each: mini guide (1 to 4 pages), standard manual (15 to 40), or full system (40+ or a living site).
- Decide the deliverable format for each: PDF only, live guide only, or both, and say why.
- Write a one-line scope statement for each brief that you would get a client to agree before building.

Worksheet: Project Scope Sheet

Lock the scope for the one brand you will document in this workbook, so every later page traces back to a real tier and audience.

Brand / client name

Number of internal users (no help)

Number of external users (partners, print, freelancers)

Surfaces the brand must work on (print / web / social / product / signage / co-branding)

Tier chosen (mini / standard / full)

Deliverable format (PDF / live guide / both)

One-line scope statement

Worksheet: Section Plan and Contents

Plan the running order of your document so it follows the standard, findable spine. Tick the sections your tier needs and note the page each will start on.

Cover and version (page)

Introduction / brand story (page)

Logo system (page)

Colour (page)

Typography (page)

Imagery and iconography (page)

Voice and tone (page)

Applications (page)

Contact and asset downloads (page)

Checklist: Pre-Build Readiness

- I have counted internal and external users and listed every surface
- I have chosen a tier (mini, standard, or full) that matches those numbers, not my taste
- I have decided to deliver both a PDF and a live guide (or justified one format)
- I have written a one-line scope statement the client can agree
- I have a section running order that follows the standard spine
- I have planned a cover with version and date and a contents on page two

The Logo System

Document the logo so it cannot be misused: clear space, variations, minimum sizes, and an explicit do and do not page.

Exercise: Clear-Space Construction Drill

Build the clear-space rule for your logo using a unit taken from the logo itself, then draw and label the exclusion zone so the rule scales at any size.

- Pick a measurement from the logo to use as the unit (cap height, x-height, or symbol width) and name it.
 - Define clear space as a multiple of that unit (commonly 1X) on all four sides.
 - Draw the logo with the exclusion zone shaded and the unit labelled with measurement marks.
 - Lock the spacing between symbol and wordmark so the lockup can never be re-arranged.
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Worksheet: Logo Variation and Size Spec

Record the full logo set and its rules so every user picks the right version at a legible size. Fill the values for your specific logo.

Clear-space unit (cap height / x-height / symbol) and multiple (e.g. 1X)

Primary lockup (description)

Secondary / alternate lockup (e.g. horizontal vs stacked)

Monochrome versions present? (black and white)

Reversed / knockout version present? (yes/no)

Symbol-only version present? (yes/no)

Minimum size digital (px) — full logo and symbol

Minimum size print (mm) — full logo and symbol

File formats supplied (SVG / PNG / EPS / PDF)

Exercise: Do and Do Not Page Build

Create the logo misuse page by applying real violations to your actual logo and marking each one, so the most-referenced page in the document is concrete.

- Apply each common violation to your logo: stretch, recolour, rotate, add effects, bad background, recreate.
 - Mark every wrong example with a clear red X and a one-line reason naming the rule it breaks.
 - Pair the two or three most common mistakes with a green-ticked correct version beside them.
 - Check your captions are specific and neutral, naming the action rather than blaming the reader.
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Checklist: Logo System Readiness

- Clear space is defined in a unit taken from the logo, drawn and labelled
- Every variation is present: primary, secondary, mono black, mono white, reversed, symbol
- Minimum sizes are stated separately for digital (px) and print (mm)
- Each version is shown on the background tone it is for, with an approved example
- The reversed or mono version is demonstrated on a photo correctly
- The do and do not page shows real violations crossed out with reasons
- Asset file formats are listed and a download location is named

Colour and Typography Systems

Build the two systems people copy most: a colour palette with exact values, roles and AA contrast, and a modular type scale.

Worksheet: Colour System Spec

Record every brand colour with its role and its values in all four spaces, so developers and printers never have to guess. Fill the values for your palette.

Colour name (usable, e.g. Brand Blue)

Role (primary / secondary / accent / neutral)

HEX (e.g. #1B3A6B)

RGB (e.g. 27 / 58 / 107)

CMYK (e.g. 90 / 70 / 20 / 20)

Pantone / PMS (e.g. PMS 281 C)

Proportion guidance (e.g. 60-30-10 split role)

Exercise: Contrast and Pairing Drill

Audit your colour pairings against WCAG AA so the brand is legible, not just on-brand, and document only the combinations that pass.

- List the realistic text-on-background pairings your brand will use.
 - Measure each pairing's contrast ratio with the WebAIM Contrast Checker or a Figma plugin like Stark.
 - Label each pairing pass or fail against AA (4.5 to 1 for body, 3 to 1 for large text).
 - Restrict failing pairings to large text only or drop them, and note colour must never be the only signal of meaning.
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Worksheet: Typographic Scale Spec

Record the type system so every heading and paragraph across the brand looks related. Derive the sizes from a base and a ratio.

Primary typeface and licence source (e.g. Google Fonts / Adobe Fonts / foundry)

Body / fallback typeface

Weights in use (e.g. 400 / 500 / 700) and when each is used

Base size (commonly 16px) and ratio (e.g. 1.25)

Display / H1 size, weight, line height

H2 and H3 sizes, weights, line heights

Body size, weight, line height (e.g. 16px / 400 / 1.5)

Caption / label size, weight, and any letter spacing

Checklist: Colour and Type Readiness

- Every colour has a name, a role, and HEX, RGB, CMYK and Pantone values
- Neutrals (greys, black, white) are grouped for text and backgrounds
- Proportion guidance such as 60-30-10 is stated and shown on a real layout
- Every text-on-background pairing is tested against WCAG AA and labelled pass or fail
- Failing pairings are restricted to large text only or removed
- The type scale is derived from a base and ratio with a role per step
- Each type level shows real sample text with its weight and line height

Imagery, Voice, and Delivery

Direct imagery and voice, then assemble and ship both a PDF and a live, maintained Figma or Notion guide plus a one-page summary.

Exercise: Imagery and Icon Direction Drill

Direct the brand's visual content concretely, with approved and rejected examples, so photos and icons stay a coherent set.

- Describe the photography in concrete terms: subject, mood, lighting, colour grade, and composition.
- Specify any treatment (duotone, overlay, grade) that brings images on-brand.
- Gather two approved photos and two rejected ones, each captioned with a one-line reason.
- Set icon rules: style (outline vs filled), stroke weight, corner radius, grid size (e.g. 24px), and source library.

Worksheet: Brand Voice Sheet

Document how the brand sounds so anyone writing for it reads as one author. Make every trait concrete with a contrasting pair.

We are / we are not (trait pair 1)

We are / we are not (trait pair 2)

We are / we are not (trait pair 3)

Voice principles (3 to 5 short statements)

Tone shift for onboarding / errors / marketing / support

Do and do not phrasing pair (same message wrong then right)

Preferred terms and words to avoid

House-style rules (case, Oxford comma, numerals)

Worksheet: Delivery and Live-Guide Brief

Capture how you will assemble and ship the document so it stays current and links to real assets. Fill the choices for your project.

PDF export with bookmarks? (yes/no)

Live guide platform (Figma / Notion / Frontify / Zeroheight)

Version number and date on cover

Asset files linked (logo SVG/PNG, fonts/licence, swatches)? (yes/no)

Contact for questions named? (yes/no)

Sharing permissions set on the live guide? (yes/no)

One-page brand-at-a-glance produced? (yes/no)

Checklist: Delivery Readiness

- Imagery direction is concrete (subject, lighting, colour, composition) with approved and rejected examples
- Icon rules cover style, stroke, radius, grid size, and source library
- Voice is concrete with we are / we are not pairs and rewritten examples
- Tone shifts are documented for onboarding, errors, marketing, and support
- The cover carries a version number and date that I will update on every change
- The document links to real downloadable assets so nobody screenshots the logo
- I have shipped both a PDF and a live Figma or Notion guide, plus a one-page summary

Your Action Plan

1. Count internal and external users and surfaces, pick a tier, and write a one-line scope statement the client agrees
2. Lay out the standard section order with a versioned cover and a clickable contents on page two
3. Define clear space in a unit taken from the logo, and draw the exclusion zone with measurement marks
4. Document every logo variation with minimum sizes in px and mm and which background each is for
5. Build the do and do not page by crossing out real violations applied to your actual logo
6. Specify each colour with a name, role, and HEX, RGB, CMYK and Pantone, with proportion guidance
7. Test every text-on-background pairing against WCAG AA and keep only the combinations that pass
8. Derive a modular type scale from a base and ratio, assign roles, and show real sample text per

level

9. Direct imagery and icons concretely with approved and rejected examples, and write a we are / we are not voice guide

10. Assemble a bookmarked PDF and a live Figma or Notion guide, link the real assets, and ship a one-page brand-at-a-glance

