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Blue Papers



Creating a Brand Book

Creating a Brand Book:

Establishing and communicating brand guidelines

Business owners and marketers can attest to the enormous amount of time, energy, effort and money that goes into developing and maintaining a brand. Many businesses and organisations spend years researching and identifying target audiences and their motivations, discovering the personal and emotional embodiment of a service line and pinpointing the visual identity of an organisation.

Anyone who's been through a branding or re-branding process, irrespective of the size of the organisation, will tell you that branding is not for the faint of heart or the short on time. Branding is a thoughtful and calculated effort by everyone involved. It's an investment that requires research, goals and objectives, strategies and tactics, measurement, time and money ... and a 'lather-rinse-repeat' approach.

How much money? A survey conducted by Marketing Sherpa in the United States and reported by eMarketer.com found that the average corporate marketing budget devotes roughly \$53,000 per year to building a brand and creating awareness.¹ A very quick internet search threw up 20% of a marketing budget as the 'norm'.

Naturally, this investment is not taken lightly and efforts should be put in place to ensure that the brand is protected - both from internal and external audiences. One such way to protect the consistency and the visual identity of a brand is through the development of brand guidelines - often called Brand Books - that clearly establishes and communicates a business or organisation's brand and the standards for use. This goes far beyond specifying which pantone colour should be used when printing the logo.

Branding is not a new topic for 4imprint Blue Papers as we produced a [Personal Branding](#) paper early last year. But this time we're zooming in to take a closer look at a specific, yet very important part of maintaining a brand: The anatomy of a brand guidelines book. Read on to learn how to develop a Brand Book for your organisation, to see elements of other business's brand books, tips for measuring the effectiveness of brand guidelines and more.



¹ "Social Media Working Better for Retention Than Acquisition - EMarketer." *Market Research & Statistics: Internet Marketing, Advertising & Demographics - EMarketer*. 20 Sept. 2010. Web. 02 Jan. 2011. <<http://www.emarketer.com/Article.aspx?R=1007934>>.

Check yourself before you wreck yourself

Whether going through a re-branding process or launching a brand for the first time, the first course of action businesses and organisations should take involves research. Yes, you're probably already researching who your target audiences are, what it is your customers are looking for, what taglines and colours are most effective and more. This external perception feedback is critical, but so is internal research.

We will say this many times throughout this paper, because it's true - in order for a brand to be adopted and implemented by employees, they need to be involved in the establishment and communication of brand guidelines. In other words, research is necessary for buy-in. So while you are surveying your customers, remember to do the same with your team. Every single member of your organisation is a brand ambassador. They embody everything your brand stands for. No matter what their role within the company the minute they set foot outside your organisation what they say and do, particularly in relation to how they talk about their work, is the living reality of your brand.

Use internal focus groups, surveys and interviews to identify the following:

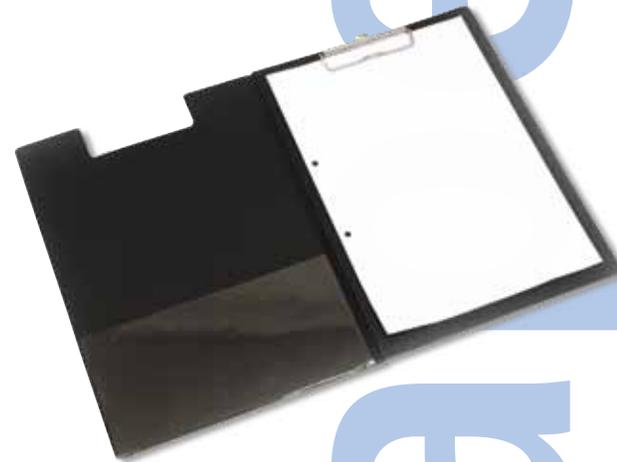
- What is the current internal perception of the brand?
- Are there existing guidelines or processes that are in place that will be affected by new guidelines?
- Do employees feel responsible for the brand? Are they willing to participate in the branding process?
- Does the brand genuinely reflect the internal culture of the organisation and vice versa?

The top ten elements of brand guidelines

Once you've nailed down some research to give your brand direction, you need to develop brand guidelines - but what do those entail? While these often vary from industry to industry and from small business to large corporations, most guidelines cover these ten topics:

1. Brand introduction

Useful to both long-standing employees and new recruits, this is a prologue to the story behind your brand and how it, and its visual identity, have evolved over time. As the old saying indicates, it's hard to understand where you're going without looking at where you've been or where you stand currently. The introduction should



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yourself

also include contact information for the brand manager, the design department and the media relations team, along with a description of when to contact whom.

2. Logo guidelines

A business or organisation's logo is its signature. Perhaps the most vulnerable aspect of a visual identity, logos can be stretched, resized, re-coloured or altogether used inappropriately without proper guidelines in place. What's more, most brands have a variety of logos in their arsenal - colour, black and white, for Web, for print, with a tagline and without, vertical and horizontal. Without guidelines, "proper use" can be ambiguous at best and confusing at worst. These guidelines indicate the exact colours, sizes, file formats and appropriate corresponding usage for all appropriate logos.

3. Colour palettes

Every brand has colours associated with it - those used in the logo, in print and on the website. Brand guidelines should not only dictate which colours should be used and when, but also how. Each colour should be listed with its name, PMS number and CMYK, RGB and HEX equivalents.

Rewind: Wondering what PMS, CMYK, RGB and HEX mean? These are simply the "recipes" used in creating colours to gauge the accuracy and consistency of a colour from printer to printer and screen to screen. Most brands create logos and colour palettes beginning with PMS colours. Also known as Pantone® Matching System, PMS is a standardised colour reproduction system. By standardising the colours through the use of PMS, designers and printers in different locations can all refer to a PMS colour to ensure a direct colour match. Red to one person may be a completely different shade to another person. Alternately, red may appear orange on one person's computer screen and pink on another. By using the PMS number 186, this colour means that the red is the same red everyone believes it to be.

The caveat here is that most in-office printers (read: non-commercial) are only capable of printing in what is called CMYK (standing for the colours of ink - cyan, magenta, yellow and black - in a printer cartridge), or RGB (standing for red, green and blue). Meaning, unless you want mismatched colours, you'll want to specify what red is allowed by indicating the PMS number and then converting that into



CMYK or RGB equivalents. Hex, more specifically Hex triplet, is the HTML/CSS equivalent of colours. However, most websites today can read CMYK or RGB without any difficulty.

4. Typefaces

Like colour palettes, brands usually have a set of typefaces that are used with the logo, in print and on the website. Guidelines show examples of these fonts along with detailed descriptions of how and when to use them. Some brands go so far as to create their own fonts for use on marketing materials, making them especially proprietary to a brand's identity and therefore crucial to protect against misuse.

5. Taglines and positioning statements

Some businesses and organisations couple logos with taglines that speak to what the brand is about, who they reach or the products and services they provide. In other situations, taglines are reserved for specific campaigns, relegated to e-mail signatures, or used specifically in radio or television adverts. Additionally, brands often have positioning statements that are used more loosely - inserted into everything from statements from the CEO, to advertising and marketing copy to search engine optimisation. Because of the variety of use, established guidelines and standards are useful for communicating to employees when and how taglines and statements should be used. Companies that operate internationally should also take special consideration of the proper translation of any taglines and positioning statements used in foreign languages.

6. Copywriting and style guides

Going further into the topic of semantics, many brand guidelines address the tone, voice and style that all copy should be written in, often breaking this down by channel and by audience. What's more, style guides are often distributed to writers to establish a consistent style of writing, ensuring that words, sentence structures, grammar and punctuation are used in the same way by each writer and across all departments. For example, here in the UK we at 4imprint adopt the letter 's' in the spelling of words where in the US they would use a 'z' – organisation rather than organization.

7. Imagery and info-graphic policies

These outline the types of images that are deemed acceptable for use in all design. For example, a brand may wish to limit images used



in marketing materials to those with muted colours and soft focus or those that have a clean look and are set on a white background, while others still may forbid the use of stock photography. Size and cropping are also considered in these policies. Many businesses and organisations with strict imagery policies often also provide art departments with a resource database - of approved images that are ready for use and available in a variety of file formats.

8. Page architecture

While you might be thinking this applies to the architecture of a business or organisation's website, it goes a little bit further than that. Some brands ask that all brochures be tri-fold or that all adverts be comprised of thirds: one-third text and two-thirds images or vice versa. While this ensures consistency, it can also inhibit creativity. Consider these guidelines carefully.

9. Social media and media relations policies

This is the piece in brand guidelines that establishes who can communicate the brand as a representative of the organisation, through what channel and by what means or processes. This has less to do with the visual identity of a brand and more to do with accessibility. Social media policies guide employees as they navigate the online realm, requiring them to disclose relationships, directing how to respond to questions or complaints and identifying what frequency of information is delivered. Media relations policies establish who can respond to inquiries from the media, either direct or indirect, and how calls or requests from the media are handled.

10. Intellectual property policies, no-compete contracts and other HR guidelines

Like social media and media relations policies, this last consideration to brand guidelines aims to protect more than just the visual identity of a brand. These guidelines protect the work that a brand creates. Often developed with the help of legal advisors and the H.R. department, these guidelines can be upheld in a court of law should someone attempt to use the brand or property created by the organisation without permission.

Beyond these ten components of many brand guidelines, there's much more to consider when developing your own guidelines - especially if you're doing so for the first time. Identity consultant, Tony Spaeth of Identity Works, shares his model



of brand identity that might be considered when developing guidelines²:

	Leadership Intentions	Situation Factors	Identity System	
			Verbal	Visual
Corporate	Destination; Vision, mission, positioning Culture; character, personality	Industry Size History Ownership Geography Management Competitors HQ location Architecture	Corporate name communicative, formal, legal Corporate modifier? description or theme line Domain name(s) Competence list	Logo (wordmark, symbol) Visual system: color, typefaces, grids, lines, other devices Interface design
Subcorporate	Composition; organizing concept, components, relationships	Principal units Competences Subsidiaries Businesses Brands, Products	Principal business unit names Linkage/endorsement words Unit naming system Product naming system	Subcorporate signature & endorsement system Unit logos Brand/product logos & endorsement system

In Spaeth's model, he defines the following:

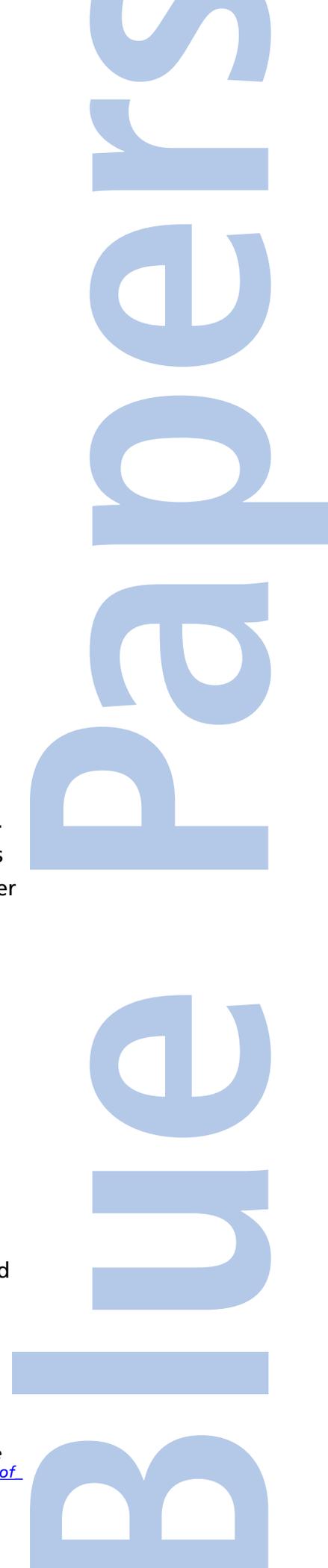
- Leadership intentions: The presence of a leader is signaled by an identity system visibly managed to express the institution's defining destination, culture and composition.
- Situation factors: Other possible facts about the company, real or perceived, that become identifying factors in the minds of audiences.
- Identity system: Elements that are more directly manipulated, such as names, themes, logos, signature systems, association models and other verbal or visual tools.

Now that we've talked about the ten elements of brand guidelines and presented the identity development model, let's take a closer look at creation and implementation. Implementation can be approached in two steps: The development and distribution of a brand guideline book (also called a brand book) and the communication of the brand guidelines and book to internal audiences.

The Brand Book

A brand book is literally a booklet that outlines the guidelines of your brand and offers visual references for some of the guidelines. These books are sometimes printed and other times packaged in PDF form and distributed electronically or placed online. Brand books should be made available to those who are either

² "Identityworks: Tools - Components of Identity." Identityworks - Tony Spaeth, Identity Consultant: Corporate Identity and Corporate Brand Building. Web. 10 Jan. 2011. <http://www.identityworks.com/tools/components_of_identity.htm>.



looking for more information on your brand or are needing to use your logo, imagery, colour palette or likeness.

Think of this book as a manual - when you buy a new car or install new software, you pick up the manual to learn how to use it. Make the same true for your brand; giving employees a step-by-step guide of what the expectation is makes it easier for them to adopt the brand and become brand champions.

Not only does the brand book provide an explanation of guidelines, it also addresses how these guidelines affect all materials and forms of communication. Ultimately, this is a pretty lengthy list. But don't worry, we've included a handy checklist as an Appendix at the end of the Blue Paper for your review.

As you create your brand book, there are a few key elements to keep in mind in order to establish an effective set of brand guidelines and a well-received brand book. Noted designer and branding expert, Jerry Kuyper, shares eight qualities he uses in all the brand books he creates³:

Strategic: Focus on why it is important and what the company is trying to achieve, not just how to do it.

Visual: Demonstrations are often more effective than lengthy text.

Easy-to-understand: Develop content that is engaging and avoid jargon.

Short: Twenty pages of useful information can be more effective than 50 pages. Don't include fillers, such as unnecessary information on how to create a business card, when templates are more effective.

Respectful: Understand who will be using the standards and don't insult their intelligence.

Balanced: Identify the appropriate balance between structure and flexibility. Too much flexibility results in chaos, too much structure results in lifeless communications.

Digital: For interim standards, create PDF files that can be viewed



³ "Identityworks: Tools - Guidelines and Standards Manuals." Identityworks - Tony Spaeth, Identity Consultant: Corporate Identity and Corporate Brand Building. Web. 02 Jan. 2011. <http://www.identityworks.com/tools/guidelines_and_standards_manuals.htm>.

online, emailed or downloaded and printed. The standards can eventually be established as an online identity resource. Most printed sets of guidelines are expensive, become outdated and out of print.

Scalable: Digital files that can be expanded or revised help to reinforce the fact that identity management isn't a static or one-time event.

With consideration to these rules, your business or organisation's brand book is sure to be well-received and effective at communicating the usage and expectations of your brand to designers, writers, marketers and others.

Case studies in brand books

Sometimes it helps to see what other businesses and organisations are doing with their brand guidelines and brand books so we've gathered a few great examples and linked them below. While not exactly an ideal way to highlight brand books, these listings will hopefully provide further insight as you develop your own book ...

Skype - <http://download.skype.com/share/brand/SkypeBrandBook.zip>

Produced in two parts this brand books divides neatly into Look and Think. Look covers the nitty gritty of how things can and cannot be reproduced and Think encompasses the firm's philosophy and way it approaches business. Together they tell the reader everything they need to know about the brand that is Skype – how to use it, what it means and what it stands for.

[American Heart Association™](#)

A page with links to important documents—such as the brand book, logos, images, templates and more—can be found on the organisation's website. This page details the importance of the brand and communicates basic information on the brand relevant to internal and external audiences. Click on a link to the brand guide book and you'll see a great example. It begins with an introduction to the AHA brand, covering the evolution of the logo and the brand voice and positioning, then leads into taglines, logos and colour palettes complete with visual examples of proper and improper use.

[Best Buy®](#)

This U.S. retail giant opted for an entire site separate from its website to provide brand guidelines and information to employees and individual chains. The site features an easy-to-navigate layout with primary navigation titled "Guidelines," "Execution," "Assets," and "Blog." The brand book is also available in downloadable PDF format that is so detailed and precise that it even includes the



exact PMS colour of the blue shirts worn by store employees. Overall, a wonderful and in-depth look at the brand.

Carrefour - http://issuu.com/logobr/docs/carrefour_brand_book

Whilst not a household name in the UK, Carrefour hypermarkets will be familiar to anyone who has spent time in France, Spain or any of the other 32 countries in which the group operates its 9,500 stores. This brand book is particularly interesting for several reasons. Firstly, it caught our eye because it's produced in purple whereas the group's colours are blue and red, or shades of blue or, well anything really except purple. Secondly, as native English speakers we'd guess that the authors of this book were probably French. Why? Because some parts haven't been translated and even some that have are a little clunky – our believes for example rather than beliefs. We're not knocking the book, simply pointing out some interesting anomalies that you might like to avoid in your own Brand Book.

[The New School](#)

An example of a brand book clearly compiled by designers, this is an aesthetically beautiful brand book that happens to be pretty useful, too. The guide covers logos, white space, typography, colours and bleed, identity as texture, text and copy, images, running dialogue, application of the visual identity and a description of the file naming structure along with a brand identity file directory.

Communicating brand guidelines

Once brand guidelines and/or books are developed, they are only effective if people know that they exist. What's more, before you can expect your employees to promote the brand to audiences and live its culture each day, they obviously need to have a clear understanding of the brand.

Make sure that each employee has access to brand guidelines and a brand book, especially designers and the marketing and communications teams. As Kuyper suggests, it's often more cost-effective to distribute these electronically, perhaps via e-mail, on the website or intranet.

Beyond the book, create an environment that nurtures the brand and ties the brand to the overall internal culture of your organisation.

Once the brand and visual identity are established, spread the word to all employees through written communication and in-person departmental meetings. Explain not only what the brand position is, but also why and how it benefits customers. The brand guidelines and/or brand book serve as a great visual aid to supplement the announcement and meetings.



Then, encourage everyone at your company to become a brand ambassador. Empower your employees to live the brand, to make suggestions that deliver on the brand promise and even consider rewarding them for showing acts of being “on brand” with recognition programmes that reward positive performance aligned with the brand.

Managing the brand is not a static process. It must be fostered to thrive. It must evolve. It’s an organic, active, on-going process. Make sure employees know this and ask that they become active participants in the brand.

Measuring the effectiveness of brand guidelines

Plain and simple: You know brand guidelines are effective and have been communicated internally successfully when your brand is being executed correctly by employees. However, as we said, brands evolve and so do guidelines. By involving employees in the brand on a day-to-day basis, you’re also likely to have an ear to the ground on what is working and what isn’t working. Perhaps files are hard to locate or are cumbersome to download, maybe partners or customers are requesting different file formats - whatever the issue, if you’re listening internally and watching the implementation of the brand through quality control measures, you’ll be able to monitor and measure the effectiveness of the brand guidelines.

Branding is no easy undertaking. It’s a significant investment that requires on-going guardianship. Protect this investment and make that guardianship easier to undertake by implementing and communicating brand guidelines.



Appendix – Brand guideline checklist⁴

The brand and visual identity

- Positioning
 - Personality
 - Key messages
 - Tone of voice
 - Editorial style
- Primary logo
 - Logo
 - Clear space requirements
 - Sizes
 - Colour: preferred and variations; positive, reverse, 4-colour, 1-colour
 - Correct and incorrect usage
- Secondary and supporting logos
 - Business naming decision tree
 - Supporting logo system
- Product names/logos
 - Product naming decision tree
 - Sub-brand logo system
- Tagline
- Graphic signatures
- Corporate typefaces
- Supporting elements
 - Primary colour palette
 - Secondary colour palette
 - Photo or illustration style
 - Typography style

Stationery

- Business cards
- Letterhead
- Envelopes
- Stationery, co-branded
- Mailing labels
- Notepads
- Internal memos
- Press releases
- Microsoft® Office templates:

⁴ "Guideline Checklist." *Brand Ensemble - Digital Brand Asset Management Made Easy*. Web. 02 Jan. 2011. <http://www.brandensemble.com/guidelines_checklist.htm>.

Paper
Bureau

- Report format
- Proposal format

Forms

- Purchase orders
- Invoices
- Quotations
- Distribution
- Bills of lading
- Returns
- Checks
- Contracts
- H.R. materials: employment applications, contracts

Phone systems

- Greeting
- Voicemail style
- Acceptable “shorthand”

Literature

- Brochures
- Booklets
- Flyers
- Product spec sheets
- Customer case studies
- International formats
- White papers
- Executive briefs
- Product catalogues
- Sales catalogues
- International communications
- Stockholder communications
- Hardcover books

Packaging

- Product packages
- Product labels
- Hang tags

Paper Bure

- Shopping bags
- Shipping boxes
- Point-of-sale materials
- In-store displays
- CD and DVD case and labels

Publications

- Customer magazine
- Employee magazine
- Business partner/dealer magazine
- External print newsletter
- External e-mail newsletter
- Internal print newsletter
- Internal e-mail newsletter

Signage

- Exterior facility signs
 - Skyline
 - Monument
 - Directional
 - Parking
 - Traffic control
 - Site marker
 - Building identification
 - Corporate flag
- Interior facility signs
 - Reception
 - Directory
 - Directional
 - Floor identification
 - Stair identification
 - Room identification
 - Workspace identification
 - Roof signs
 - Decals on glass

Vehicle graphics

- Service vans
- Delivery vans
- Tractor trailers

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- Plant vehicles
- Security vehicles
- Landscaping vehicles
- Buses
- Train cars
- Ferries/ships
- Containers
- Aircraft
- Blimps/balloons

Uniforms

- Employee badges
- Visitor badges
- Contractor badges
- Security
- Shirts/ties
- Jackets
- Overalls
- Lab coats
- Hard hats
- Service hats
- Seasonal uniform style

Exhibit systems

- Trade show booths/exhibits
- Floor displays
- Posters
- Banners

Web and interactive

- Site design and interface
- Web page templates
- Information design
- Content style and administration
- Corporate Web site
- Division/group sites
- IT systems: call centres, order entry, etc.
- Employee intranet site
- Web advertising

Paper
Bureau

- E-commerce site
- E-mail style
- Direct e-mail programs
- Interactive CDs
- Multimedia presentations
- PowerPoint® presentations

Special events (print and Web)

- Sports sponsorship
- Co-sponsorship
- Charity sponsorship

Advertising

- TV advertising signature
- Print ads, magazine
- Print ads, newspaper
- Outdoor ads, roadside
- Outdoor ads, bus shelter
- Outdoor ads, train station
- Vehicle ads, bus
- Vehicle ads, taxis
- Direct mail campaigns
- Web banner ads
- Co-op advertising

Promotional items

- Hats
- T-shirts
- Sweatshirts
- Golf shirts
- Golf umbrellas
- Notepads
- Pens/pencils
- Keyrings
- Mugs
- Carrier Bags
- Laptop Bags

Got all that? Just think of it as brand inventory—key to protecting the investment of your bottom line.

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