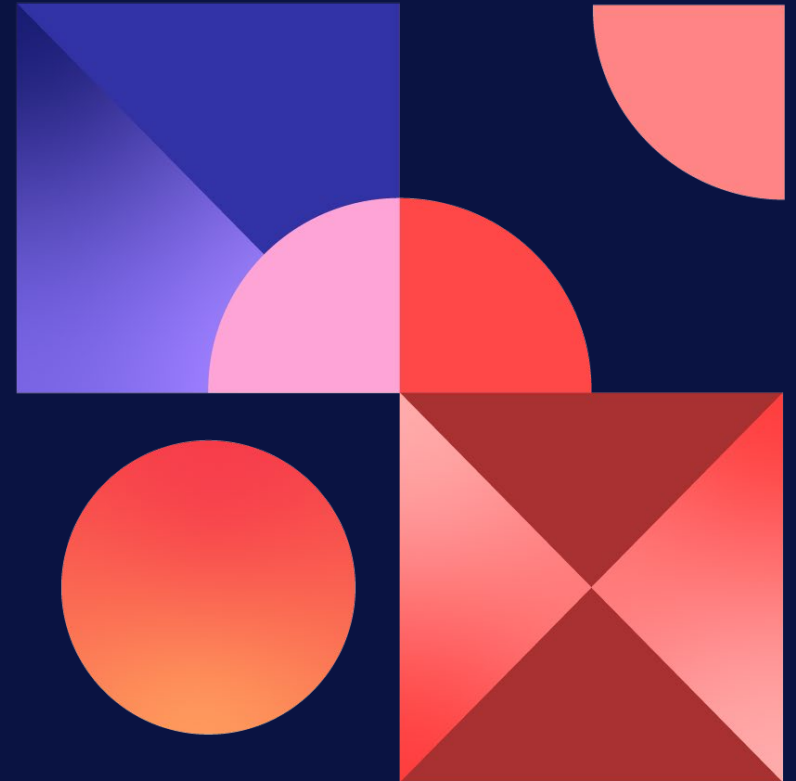




The Financial Services Rebranding Playbook

A step-by-step guide to reinventing your brand identity for professional and financial services firms



Introduction

Rebrands require a mammoth effort. But for financial and professional services firms, they can be especially challenging. The success of these brands lies heavily in the hands of (non-marketing) employees - client-facing teams who create and share many of the most influential documents with clients and prospects (e.g. pitchbooks, proposals etc.)

Therefore, in these sectors, the **success of a rebrand is highly dependent on the internal adoption** of the new brand; from ensuring teams can effectively communicate your mission and values, to helping them master new PowerPoint templates and assets. Making sure this happens consistently, across a complex, global landscape, is the ultimate test.

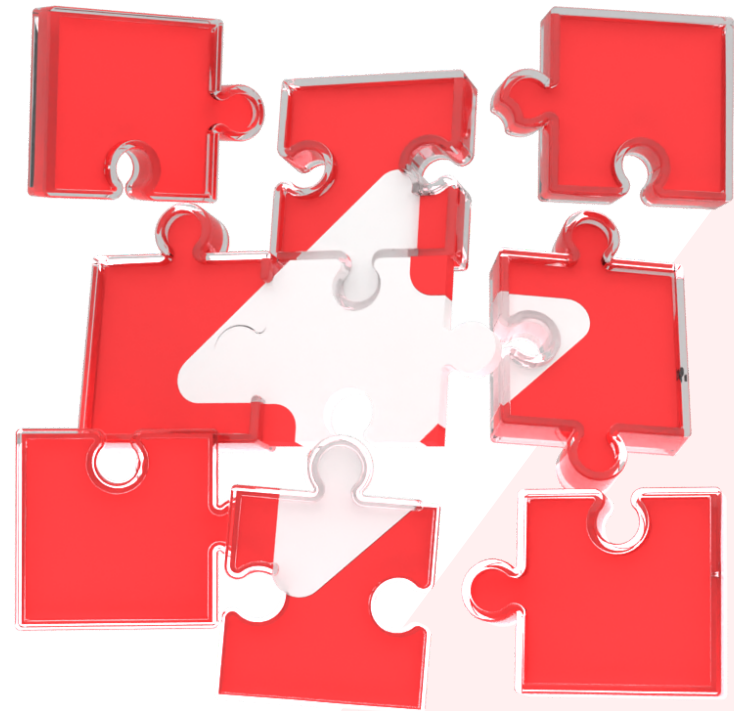
In the last 10+ years, we've worked closely with many such firms to help them ensure the success of their rebrand, experiencing their challenges first-hand. We also went through our own rebrand in 2020 - which we executed entirely in-house.

For this eBook, we've collated all of this knowledge, as well as insights from some of our clients who have recently navigated their own rebranding projects: **UniCredit, Mazars, Singer Capital Markets, Apax Partners, and Forensic Risk Alliance.**



We hope you find this a valuable resource to help ensure your rebrand is a success.

Of course, there is no one set way to do a rebrand; the process will inevitably be unique to each business.



Content

1: Defining your rebrand mission — 05

2: Conducting your brand audit — 09

3: Planning your rebrand — 11

Developing your communication strategy — 19

Building your winning team — 25

Getting organized — 29

4: Creating your new brand identity — 31

Defining your vision, mission and brand values — 33

Changing the name of your brand — 37

Updating your core visual identity — 39

Establishing your brand voice — 47

Updating your marketing materials — 50

5: Rolling out your new brand — 53

Ensuring internal adoption — 54

Planning your external launch — 65

6: Measuring the success of your rebrand — 69

Appendix — 73

Conclusion — 75

Thank you — 75

Part 1 Defining your rebrand mission



Before you begin doing anything, you need to make sure you have a clear understanding of why you're doing this rebrand, what you want to achieve and when you want to achieve it by. Along with your core team, consider the following carefully:

Why are you rebranding?

Make sure your core team are sure about exactly why you're investing in this project. It could be to modernize, to align with your new growth strategy, or as a result of a merger. There could be more than one reason but try to keep it simple to make sure you're focused on one clear goal. Ensure the motive behind why you're rebranding aligns with, and supports, your company's broader strategic objectives and that you can communicate that simply and effectively.

Explaining clearly how the new brand will support the business's wider goals, and setting clear objectives that demonstrate tangible benefits, will help you secure internal buy-in.

It's the key to taking the rebrand from a 'nice to have' to a 'must have' project.

How will you measure success?

Decide what you want the impact of the rebrand to be – for example, it might be increased brand awareness in a specific region, or better brand consistency across multiple global offices.

Outline realistic, measurable objectives. For example, this could be an increase in organic traffic to your website, improved perception of your brand (according to a focus group), or more clarity and consistency internally on what your mission and values are following a merger. Be clear on exactly how you're going to measure success and when.

“



There's never going to be one clear rebrand process for everyone. My best advice is to **model your rebrand project on the culture of your business.**

If you're in an entrepreneurial, people-led business like us, you have **to make quick decisions** and move fast on the rebrand project. **If you don't move quickly and deliver results to the business, you'll lose impact and belief from your key stakeholders.**



Sonal Hirani , Marketing Director –
Forensic Risk Alliance

Who are you doing this for?

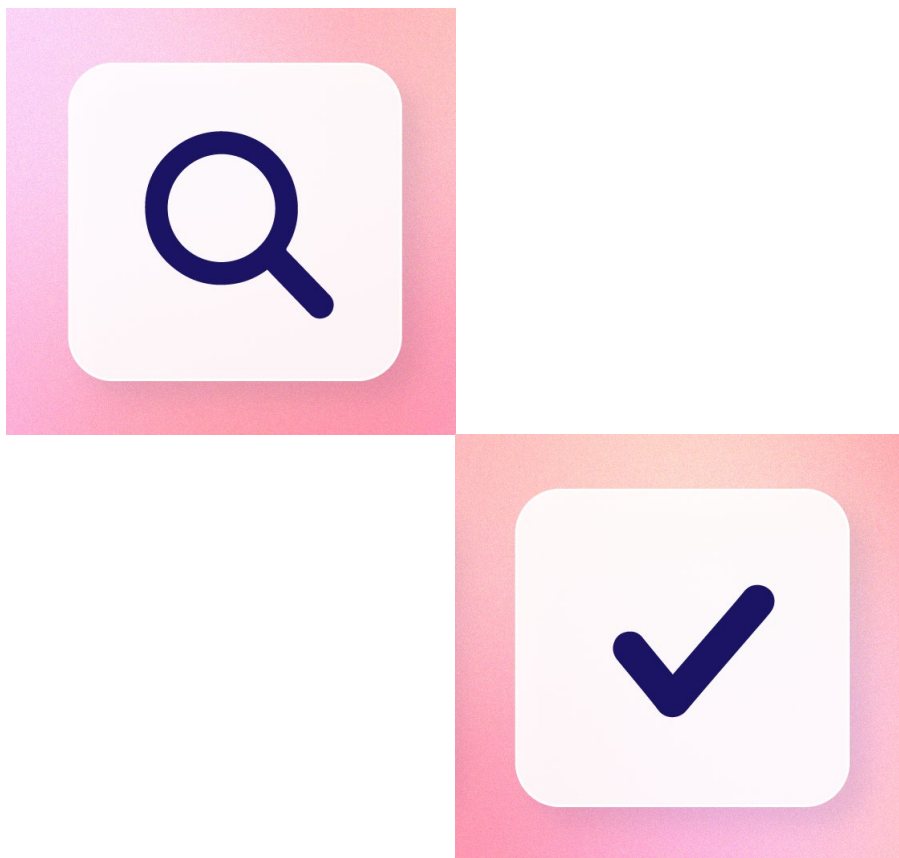
Establish who your key stakeholders are and who your rebrand needs to serve. You need to have a solid understanding of your target audience/s to be able to properly identify what they want and need from your brand. If you haven't already, start to build personas (or revisit existing ones) to establish what these audiences want, expect and need from a company like yours. This will help you decide what needs to be adapted and how, to better attract and retain them.

Try to speak to as many people within your target market as possible when doing this; this trumps desk research any day.

When do you want to achieve it?

What's your timescale: six months? A year? Two years? Map out a timeline that suits this and work backwards. And be realistic – think about your constraints: budget, resources, other significant projects happening within the business. It might be beneficial to split the rebrand into phases if needed; this will allow you to be very clear about what the objectives are for each stage and therefore help you manage time, resources and expectations internally.

Part 2 Conducting your brand audit



Before you move forward with a rebrand, you need to understand exactly what your starting position is.

“

Apax

Start with a brand culture **discovery phase**. A rebrand project is never going to be a quick fix. Before jumping into any visual identity changes, you must start by questioning **who your brand is and where you want it to be in future**.



Ollie Syed,
Creative Services Manager –
Apax Partners

How is your current brand perceived in the market?

The best way to assess this is by running a thorough brand audit; it will help you step into your clients', prospects' and employees' shoes. Examine everything from how your internal and external stakeholders feel about your brand, to what they perceive your core mission, values, strengths and weaknesses to be. Then explore what they think of your external branding and key marketing assets.

If you get this right, it will help you understand the gaps between where you are, and where you want your new brand to be, and to identify your biggest priorities when it comes to closing that gap.



Lorraine Hackett,
Group Brand & Communications Director – **Forvis Mazars UK**

“

We embarked on an 18-month, in-depth brand audit to discover what makes Mazars unique, understand how our clients, staff, media and other stakeholders see us, and identify the white space we can occupy in the market.

This landscape analysis and testing phase helped us to define our positioning, narrative and visual approach; which in turn enables us to look, speak and brand consistently.

**forvis
mazars**

“

At Forvis Mazars, we conducted research, using surveys, interviews and focus groups to discover:



How our internal teams think/feel about our brand



How our external stakeholders think/feel about our brand



How we are positioned in the media landscape



How we compare against our competitors

7 steps to a successful brand audit:

1. Be clear on your business vision and mission

Revisit your mission statement, or if you're establishing a new one, aim to have a good idea of what this will be from early on; it will influence which topics need additional focus.

2. Establish the scope of the audit

There are three key areas you should consider:

- ⚡ Your company's internal culture (brand values, mission, ethos)
- ⚡ Your external branding (logo, website, marketing materials)
- ⚡ Your customer experience (sales process, customer support)

3. Understand your internal brand perception

Speak to your internal teams and ask them:

- ⚡ How would you describe the company culture?
- ⚡ What do you think are our core values?
- ⚡ How are they reflected in the way we work?

If you're a large firm, a combination of anonymous surveys and focus groups can help you get a good breadth and depth of feedback.



Top tip

If your business is global, make sure you have a good representation of perspectives from all core regions to ensure you're not missing an important piece of the puzzle.

4. Examine your external brand positioning

Create focus groups consisting of employees, clients and your target audience, to get a rounded view. First, examine the core aspects: your name, logo, colors and fonts; how do people feel about them? What impression do they get? Then move onto your core marketing materials.

Get as much detail as you can to ensure it's actionable.

5. Assess your customer experience

Map out your customer journey and interrogate each step from prospect stage through to client. What's going well and what isn't? How does this affect brand perception?

6. Evaluate your competitors' brands

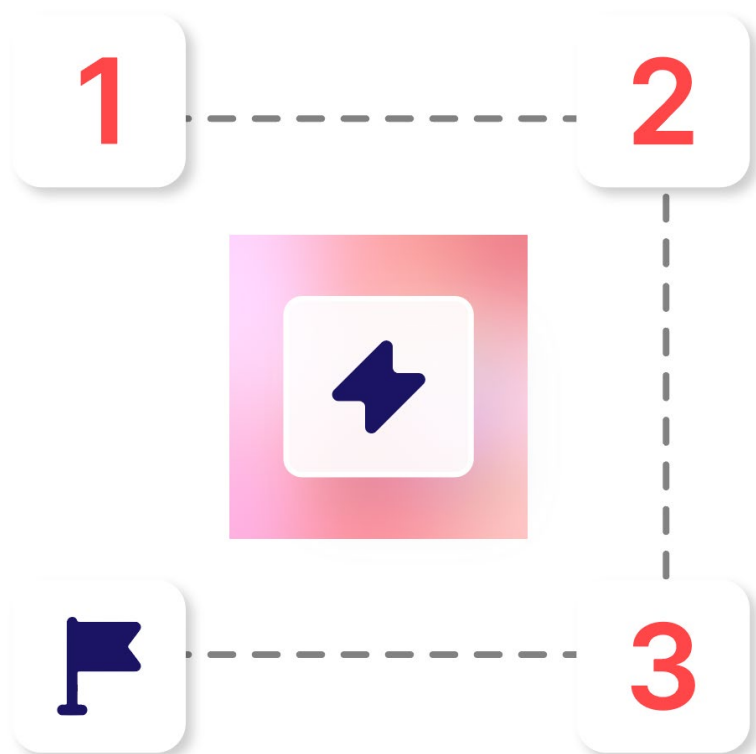
Map out your competitor landscape and conduct a SWOT analysis for you and each of your main competitors. In which areas is your brand strong and where might there be opportunities for you to address a need or desire?

7. Review results and map out change

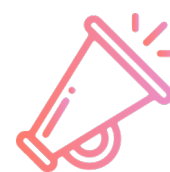
Summarize your findings and prioritize the actions or opportunities you've identified. Refer back to this when it's time to create your new brand.

For more insight, read our article ['How to do a brand audit: 7 key steps'](#)

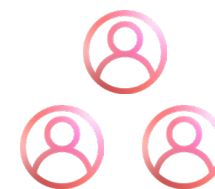
Part 3 Planning your rebrand project



As with any project of this scale, having a robust plan is key to success. In this section, we've outlined some key aspects you should consider:



Developing your communication strategy



Building your winning team



Getting organized

But of course – their order will depend on the specificities of your project.



Sonal Hirani,
Marketing Director – **Forensic Risk Alliance**



You must establish your core mission for the rebrand project and what ‘good’ looks like – essentially, your MVP (minimum viable product). Do this as early as possible in the project.

This will make it easier for everyone to work towards the same goal from the offset and is invaluable, particularly as you get into the latter stages of the project.

Be sure to communicate your MVP and not your ideal solution to your stakeholders. This way, everyone will have a clear idea of what a successful rebrand will look like for your business.



“
For us at Forensic Risk Alliance, this was three key areas:



A modernized visual identity that worked across various mediums



New marketing and collateral templates, from LinkedIn imagery to brochures



Launch of UpSlide with content in the new branding

Internal communication

External communication is often a big focus for rebrand projects, however, a huge factor in the success of your rebrand is ensuring it is fully adopted internally. You need to have a solid change management strategy from the beginning to enable this.

Getting buy-in from your employees early on will help to reduce resistance to the change further down the line.

Some tips to consider:

- ✓ **Be clear about why you're rebranding**
Help teams understand the reasons behind the change, and what the benefits will be for the business and for them.
- ✓ **Reassure teams**
Let them know what you expect from them and when (and how you'll make it easier for them); if they will need to create presentations in the new brand from a certain date, give them plenty of notice and explain how you'll train them on this.

- ✓ **Be transparent about the timeframes**
Rebranding projects can often be delayed, so to avoid confusion, plan carefully when you want to communicate your launch date.
- ✓ **Adapt the plan to your organisation's culture**
Remind yourself (or discover) how your teams operate; for example, teams might use different platforms to communicate. And make use of multiple channels and formats to reach them: email, Teams/Slack, meetings, webinars and Q&As.
- ✓ **Involve teams in the process**
Set up processes for questions and feedback (through a [Trello](#) board, for example) so it's clear their input is welcomed, and they feel invested in the project.



“

forv/s
mazars

One of the big challenges is educating non-marketers or individuals outside the branding space about the importance of having a strong, unified brand.

You must take the time to bring your people on the journey with you, **educating and engaging them** along the way.

- ⚡ What do we mean by brand?
- ⚡ Why should you care about your business' brand?
- ⚡ What's the impact of having a fragmented brand?
- ⚡ What's the link between building a brand and growing your business?

It's also key to ensure everyone is aware of their role. Marketing might facilitate the rebrand, but **to truly embed the brand and bring it to life relies on everyone in that business.**



Lorraine Hackett, Group Brand & Communications Director –
Forvis Mazars UK



Kim Steinsberger,
Brand Manager, Corporate & Investment Banking
UniCredit

“

The key to getting people on board with your new brand is to **take them on the journey with you**. Take the time to help them understand **why you are doing it, how the rebranding will benefit them**, and what the new brand represents.

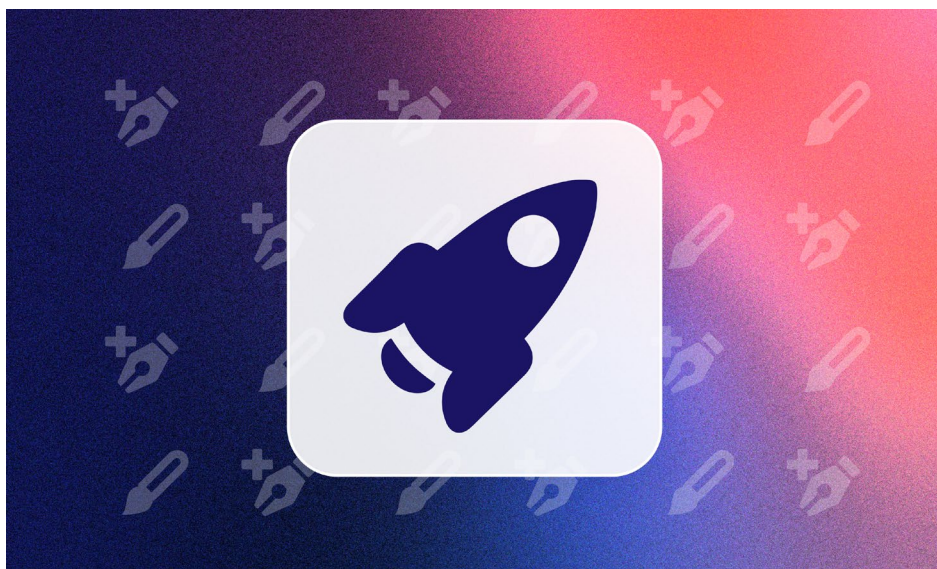
People are much more likely to adjust and welcome change if they feel like they're a **part of the process**.

External communication

Similar to your internal communication plan, make sure you have a clear story to tell about why you are rebranding and how it's going to affect, and most importantly benefit, each of your external stakeholders.

Ensure they understand what is changing, when and why. The key here is adapting your communication strategy to your audience, whether that be clients, partners or suppliers.

See [Part 5](#) for more detail on planning a successful external launch.



“



Having a **communication strategy** that spans your entire rebrand process is key.

You'll need to plan:

- ⚡ What's **the best way** to communicate within the rebranding team?
- ⚡ At what point do we tell our **staff**?
- ⚡ At what point do we tell our **clients**?
- ⚡ What are the **most effective methods of communicating** the new brand to people?

Getting your communication strategy right can either **make or break a rebranding project**.



Joanna Osborne, Head of Marketing
Singer Capital Markets

Build your winning teams

Establish an **internal brand committee**

Your committee can be made up of senior stakeholders from across the business. They should be responsible for leading the strategic direction of the project and also making key decisions, such as signing off on the core visual identity.

“



We created an internal brand committee whose job was to analyse the current brand and agree on what to keep, what to optimize, and how the brand can support the strategic vision of the business. This committee should include **multiple perspectives from marketing and the wider business**.

Before embarking on the rebrand project, the brand committee must be **clear on what they want their new identity to be**.



Joanna Osborne, Head of Marketing –
Singer Capital Markets

Pick your **core project team**

In your team you'll likely need a project manager (at least one), your branding experts (internal or agency), an IT stakeholder, someone from the legal team, and a finance representative.

“



A rebrand is a fantastic opportunity for other people in the team to **learn and showcase their abilities**. Identify what parts of the project you need to lead and involve other people with **relevant strengths** in the team. This will change as the project progresses and is usually an exciting one for the team to be involved in.

Plus, rebranding should also enable you to look at your business **from the outside in**. Outsource parts of the process to external experts like design agencies, web developers and consultants to help you deliver the **best result possible**.



Sonal Hirani, Marketing Director –
Forensic Risk Alliance

Build your winning teams

Select some **brand ambassadors**

“

**forvis
mazars**

We recruited **brand ambassadors** from each country to act as local captains for the rebranding project. They were crucial in helping us ensure the new brand **resonated and was successfully rolled out** across the globe. We held **monthly calls** to talk to our brand ambassadors, test and get feedback on new materials, explain how to implement them and get everything in place ‘behind the scenes’, ready for the big reveal.

The brand ambassadors were **key during the planning and roll-out**, ensuring ‘on-the-ground’ implementation and feedback.



Lorraine Hackett, **Group Brand & Communications Director** –
Forvis Mazars UK

“

Singer
Capital Markets

Managing a rebrand is difficult as there are lots of **moving parts**. Many different teams are required to execute the project. To ensure everything runs smoothly and that everyone works well in a team, we:

- ⚡ Established a **leader** of the rebrand project team, who was responsible for **allocating tasks** to people within the business
- ⚡ Used **detailed Gantt charts** to help us easily keep track of our **progress**
- ⚡ Set up **automated notifications** to remind people when they had a new task to complete

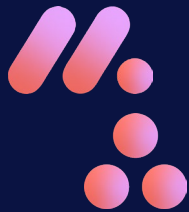
We wouldn’t have been able to stick to our rebrand deadline without these processes.



Joanna Osborne, **Head of Marketing** –
Singer Capital Markets

Get organized

Now you have your team in place, it's important to make sure they are aligned and that you're all singing from the same hymn sheet. Some things you can do to help this:



Have the right tools

Invest in a tried-and-tested project management tool, if you don't already have one. Your Excel spreadsheets might not cut it for such a complex project, so consider a tool like [Monday.com](https://monday.com) or [Asana](https://asana.com), which allows you to **create complex workflows and timelines** which are easy to understand and update.



Maximize meeting time

Set up a regular project meeting for the core team. Some people will only be involved at specific stages so **make the meeting optional for those**; they should only attend when they need to. You should also record them in case people miss them.

Use your project plan as the basis for this meeting, making live updates where possible.



Automate reminders

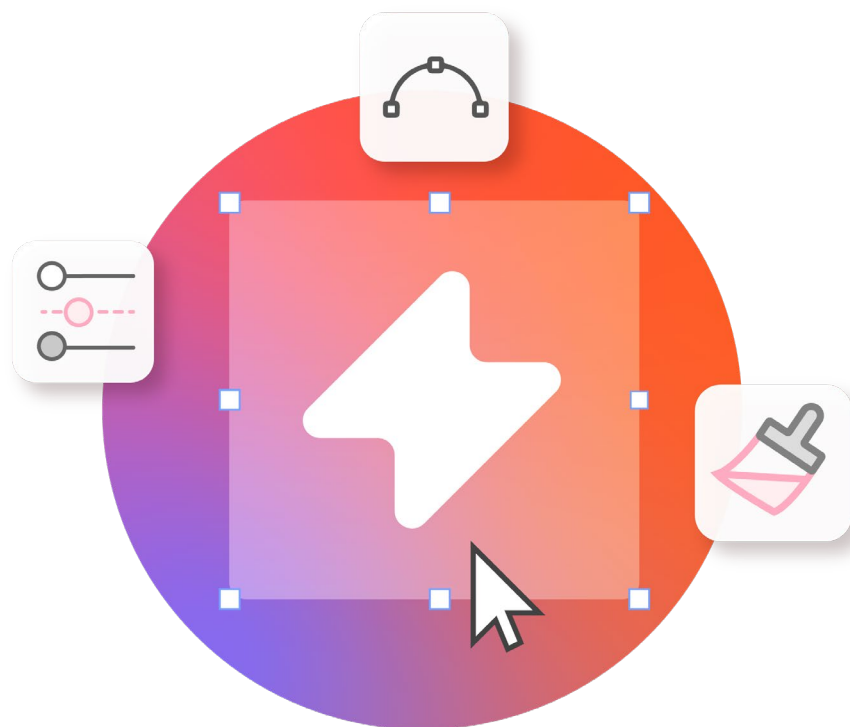
A tool such as this will also allow you to set up reminders so **nothing gets missed**. If you don't have one, make good use of Outlook to set deadlines for the individuals involved.



Set up a Teams/Slack chat

Set up a dedicated chat or channel for **quick questions and decisions** related to the project. Teams channels are better as you can keep specific topics separate from one another to **avoid confusion or overload**.

Part 4 Creating your new brand identity



Now that you're clear on the objectives of your rebrand, and you have a winning plan and team in place, it's time to get to the exciting part – creating your new brand!

Before you even touch your name or logo, however, you need to sit down with your internal brand committee and decide on the fundamental aspects of your brand – your mission and values.

These core elements will act as the foundation for everything else to come, so it's essential you dedicate enough time and attention to these.

Think of this stage as defining the DNA of your brand.

Our recommendation is to keep it simple by defining three key things: your vision, your mission and your brand values.



Vision



Mission



Brand value

Defining your vision, mission and brand values

Your brand vision

Your brand vision statement should define what success will look like for your business. It should be aspirational and reflect its ambitions in a clear and impactful way. You can think of your vision as the 'what' part – **what is it that you want to achieve?**

Some examples of vision statements:



Wells Fargo: To satisfy our customers' financial needs and help them succeed financially.



Goldman Sachs: To be the advisor of choice for our clients and a leading participant in global financial markets.

Your brand mission

Your brand mission represents the 'how' part.

How will you achieve this vision? To help you, think about what you do and why, who you are doing it for and how.

Some examples of brand missions:



Goldman Sachs commits people, capital and ideas to help our clients, shareholders and the communities we serve to grow.



Morgan Stanley's mission is to provide our clients with the finest financial thinking, products and execution. This means setting the highest standards for behaviors that embody our business principles.




Defining your vision, mission and brand values

Your brand values




If defined properly, your values can help you to truly stand out from the competition. They can help you communicate your culture, what you care about, and your USPs, creating an emotional connection and a sense of loyalty to your brand.

It's easy to pull together a set of obvious, generic values. But these will likely say nothing unique about your brand personality, nor will they be very memorable for your employees or clients. Instead, try to create a set of genuine values that truly reflect your company culture.

To start with, you can look back into the results of your brand audit, specifically:

- 
Your strengths
 What did you identify as your key strengths; what makes your product or service unique, according to your existing clients and other stakeholders?
- 
Your customer personas
 What do they really care about? What values do they hold and which ones might you share with them?
- 
Your competitors
 What are their values and is there a gap between what your target audience wants? Is it something you can address as a brand?

As well as being unique, strong values are also:

- 
Actionable
 They should be translatable into tangible, easily describable actions that have a practical value.
- 
Meaningful
 They should be founded in a sense of purpose that everyone in the business can get behind and feel passionate about.
- 
Timeless
 They need to stand the test of time and not expire in a couple of years. Your initiatives will evolve, but the value purpose should remain consistent.

At UpSlide, for example, our values are:



Happiness at work

We want to make our clients' work more enjoyable. We also want that for our own employees; we believe that people do their best work when happy and fulfilled.



Excellence

Our clients have high standards and care about the smallest detail. So do we; we share this value with our clients and they respect and appreciate this in us as a partner.



Trust

Our clients put their faith in us to do a great job, and likewise, that's we do with our employees. We hire talented people and trust them to do a great job.

Changing the name of your brand

Changing the name of your brand is not a decision that should be taken unless considered absolutely necessary (after a significant merger, for example, or to distance yourself from a damaged or underperforming brand).

For this reason, we won't delve into that too much in this eBook, but if you do decide to, **here are some key things you should consider:**



Choose a name that works internationally

Take into account multiple languages and cultures. Even if you're not global now, you may expand in future



Make sure you check the relevant domains and social media handles are available

You can use [Knowem](#) to check all of these at once.



Involve your legal team to understand the legal implications

For example with trademarks, Companies House updates, notifying the FCA etc.



Have a plan for minimising the impact on SEO

Have you got a robust strategy in place to mitigate any risks involved with this?



Prepare for a lot of administrative work

For example, changing names on bank accounts, T&Cs, contracts etc.

For now, let's move on to creating the visual elements of your new brand.

Updating your core visual identity

Now you have defined your brand personality, it's time to make it come to life via your new visual identity. There are three main aspects to consider here:



Logo



Colors

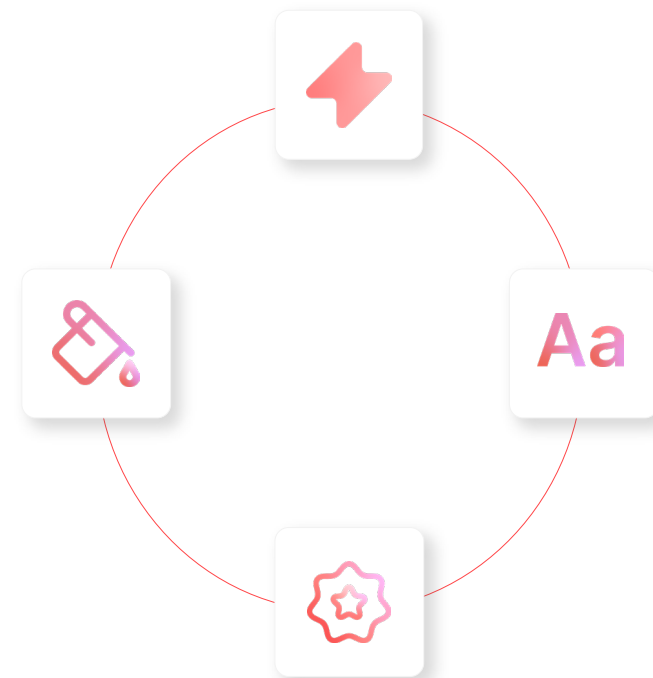


Fonts

Whether you're using an external agency, or in-house resources, the first step should always be to onboard your design team fully with your new brand vision, mission and values.

Try to do this in person/via virtual meeting, and make it as clear, inspirational and engaging as possible, so they get a true sense of the new brand and what it stands for, and feel excited to be working on the project.

Each element will of course require a **detailed brief**, outlining very clearly what your acceptance criteria are, but in the next few pages **we'll share some tips on creating each element.**



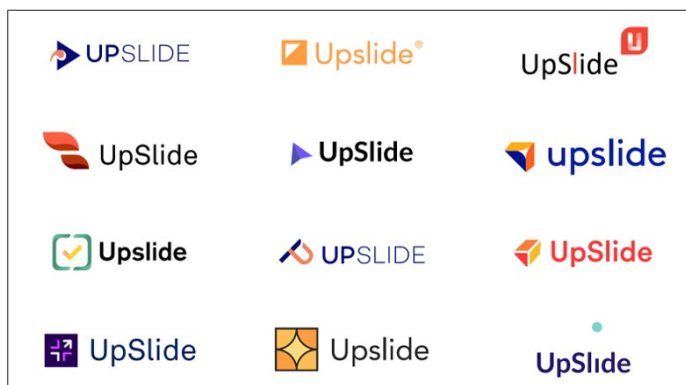
Logo

Start by creating a series of mood boards, focused around your core values. Ask your brand committee to contribute to these with examples of branding which they feel reflect these values well.

You should also revisit the analysis you did on your list of competitors, but widen this to include some of your peers too, and display their logos alongside yours:

- ⚡ What do you notice?
- ⚡ Does your logo stand out?
- ⚡ Why? For good or bad reasons?
- ⚡ What aspects work well and what might need to be updated?

Once you've got a good idea of the direction you want to take, have your designers create a shortlist of 10 to 12 logos for your brand committee to review and ask them to vote for their top three. Here's an example of the shortlist we created for our own rebrand in 2020:



Test these three logos with some key stakeholders: employees, clients, partners etc., as well as individuals who do not know your brand yet at all. Make sure you ask for specific, detailed feedback on what people like and don't, and most importantly why.

Check how their responses match up against your newly established values, to evaluate each logo's effectiveness.



Top tip

We recommend testing with as many different people as possible, to ensure that your core audiences have been properly accounted for – for example, **certain colors or symbols will not work well in specific regions**, so don't limit yourself to borders if your scope is **international!**

40% of Fortune 500 companies use blue in their logos.

[Source](#)

Colors

Consider the psychology of color

Colors carry strong emotional connotations and so they can have a powerful impact on your brand. They can also be traditionally associated with specific industries; you can either choose to align with this (especially if you are a traditional brand that wants to maintain this reputation) – think the traditional blues for finance firms. Or, you can choose to go against this to try and stand out from the crowd and appear forward-thinking or innovative (think: Monzo.)

Read this article to delve further into the [psychology of color use in branding](#).

Consider how your colors will be used in practice

When creating your color palette, one of the most important things to consider is how this will be used in practice by marketing, but especially by teams on the ground. For example, in finance and professional services in particular, it's likely that your teams will be creating lots of charts, tables and graphs.

Consult your teams to find out the number and nature of colors they will need to have at their disposal, and consider using various shades of the main colors to expand the palette in an easy and effective way.

According to a study, **62-90% of product assessment** is based on colors alone, so it's important to get your brand palette right.

[Source](#)



Fonts

A few things to consider when choosing your new font:

- ⚡ **Like colors, fonts can evoke an emotional response too.**
 Generally speaking fonts which have 'feet' (Serif fonts) such as Times New Roman, evoke feelings of tradition, trust, history and formality etc. Whereas Sans Serif fonts (those without 'feet', such as Helvetica) are seen as more modern, dynamic and innovative.
- ⚡ **Make sure the font you choose works well across different channels** – what might work well in a PowerPoint document may not look great on emails or in print. You might need to consider having a second font for specific channels.
- ⚡ **Use custom fonts wisely.** Custom fonts are great – and are a good way to make you stand out and give an added edge to your brand. But remember, you need to make sure that people download and install them, which can be challenging in a large organization. Otherwise, they won't be used.
- ⚡ **Consider hierarchy** – test out your font on key templates – your website, email templates, brochures ad proposals etc to make sure that it works well when using different text levels.

Read this article to find out the [six steps we took when reinventing our own brand identity](#).

Times New Roman

Aa Ee Rr *a*
Aa Ee Rr *a*

Publisher

abcdefghijklm
 nopqrstuvwxyz
 0123456789

Helvetica

Aa Ee Rr *a*
Aa Ee Rr *a*

Kunsthalle

abcdefghijklm
 nopqrstuvwxyz
 0123456789



Establishing your brand voice

Now it has a name and face, it's time to give your brand a voice to match its new image. Consider from the outset that, ultimately, this needs to be explained in a simple set of guidelines that can be used day-to-day by both marketing and the wider business. So make sure you describe it in a clear, easily understandable and applicable way, including plenty of contextualized examples.

Consider your personas

This might be hard if you have several to cater to. But think about what they want and need from you, how they prefer information to be presented and what their challenges are, and place this at the heart of your tone of voice (TOV). For example, if your core personas are busy and want information to be concise and easily digestible, being direct and using straightforward, jargon-free language will likely be a core element of your TOV.



Top tip

You don't have to keep this as an internal tool only. Monzo recently published their TOV guidelines on their [website](#), helping to instil a sense of transparency and trust.

Think about how your values translate into communication styles. Here's how we did that at UpSlide:



Trust

Confident and humble

We speak clearly, carefully and with authority; we are solution-oriented. We are never boastful and respect our competitors (we refer to them as 'peers').

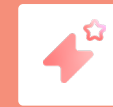


Happiness at Work

Friendly go-getters

We show empathy, are sincere and natural; we have a warm tone.

We are also optimistic and positive, speaking with determination.



Excellence

Smart and expert

We use short sentences and choose words carefully; we communicate in the most efficient way. We're also clear, accurate and credible; we speak from experience.



Kim Steinsberger,
Brand Manager, Corporate & Investment Banking
UniCredit



Aesthetically pleasing marketing materials are useless if they're not useful for your business teams.

When we were rebranding our PowerPoint templates, our branding team worked hand-in-hand with our business stakeholders from day one to ensure the new templates were optimized for their needs.



Updating your marketing materials

Now you have your core visual identity finalized, and a new graphic charter created, you can start to apply this to your key marketing materials and wider branded assets.

This is where things risk getting a bit out of hand – the scope of work can creep if you haven't been clear about your MVP at the start, as it's tempting to want to improve everything as you go along.

To prevent that, create your prioritized list of assets based on what you learnt about your most important customer touch points. Some key things to consider:



Your website

Try to establish as early as possible how far you want to go (and how much resource you're willing to dedicate to this). Will you re-skin, revamp or completely rebuild your site?



Your Microsoft Office templates

PowerPoint, Excel and Word templates often get deprioritized. But, especially for professional and financial services firms, these form the basis of the most important, and frequently seen, client-facing documents. So, invest enough time in optimizing these.

Read our article on [how to create a successful, user friendly PowerPoint template](#)

Other elements to include on your to-do list:

- ✓ **Email templates** – newsletters, event invitations, automated sequences etc.
- ✓ **Advertising templates and visuals** (LinkedIn, Google etc.)
- ✓ **Event materials** – banners, merchandise, flyers
- ✓ **Social media** – LinkedIn, Twitter, Facebook, YouTube
- ✓ **Email signatures** – logo, signature banners
- ✓ **Printed materials** – brochures, business cards
- ✓ **Digital content** – eBooks, whitepapers, blog imagery, podcasts
- ✓ **Sales collateral** – flyers, brochures, internal presentations
- ✓ **Legal and financial documents** – quotes, invoices, Ts and Cs and contracts
- ✓ **Office signage and stationery**



Top tip

In a post-pandemic world, the way many marketing assets are being used has changed. Many firms are switching to a **digital-first approach**, so templates need to be created with this in mind. Some things to consider:

Font size – optimizing font levels so that they can be read easily on a digital screen

Color palette – choosing colors which work well in both a digital and print format

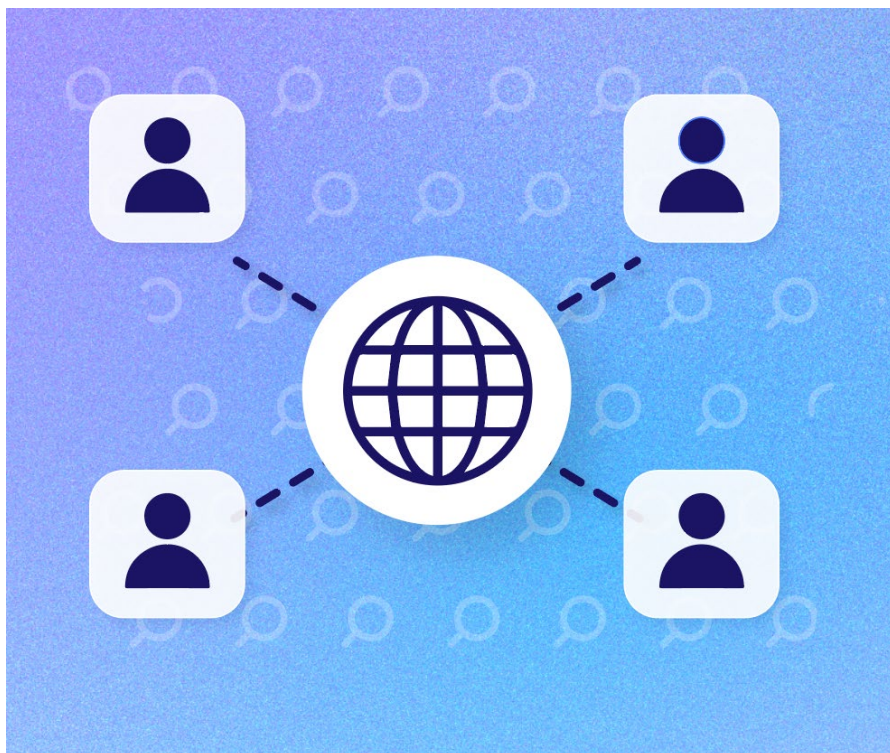
Document layout – selecting layouts and structures which are optimized for digital screens

Working with a design team

If your PowerPoint and Word documents are a vital part of your marketing armoury, you should ensure that your design agency has specialist expertise in this area. For example, our in-house design team are Office experts and know how to design materials that are both aesthetically impressive and useable. [Find out more here.](#)



Part 5 Rolling out your new brand



Internal adoption

For professional and financial services firms, perhaps the single most important factor in your rebrand success is internal adoption – ensuring everyone in the business adopts the new culture and values, and actually uses the new materials in practice. And it's the aspect that most of our clients find most challenging, so here are some strategies they've found to help them tackle this:

Onboarding your teams successfully in the new brand

We referred earlier to the fact that having a strong internal communication strategy throughout is vital. And it's never more important than when you're preparing to launch your new brand.

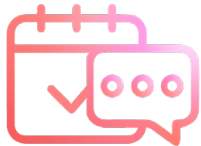
You need to begin onboarding your internal teams well before the actual launch date. If you want to ensure that your new brand is being used consistently from day one, then teams need to be fully prepared in advance of this date, so they are able to build their proposals, pitchbooks and reports successfully in the new brand.

At the same time though, you don't want to bombard teams with too much information at once. Consider the following actions:



Hosting an internal brand launch event

Ideally this should be in person, however, online or hybrid events can work well. Use this as an opportunity to generate excitement around the unveiling of the new brand. Invite senior stakeholders to present on what the new brand means for the business and how it is going to help the company achieve its goals.



Running training webinars on how to use the brand

This stage is all about enabling people to use the new brand in practice. Run small, team-specific sessions to show people where to find the new materials, how to use them to create their day-to-day deliverables (contextualized examples are best) and who to turn to for support. Record these sessions and make them available for people who missed them or for new starters.



Supporting teams effectively

Be ready to respond quickly and effectively to queries from day zero; make sure you have the processes and the resources in place to do that.



Top tip

Use these sessions as a chance to refresh or enhance your teams' presentation skills. For example, when demonstrating how to use the new PowerPoint template, you could also add in some useful tips on how to create great-looking slides that improve their decks.

It's an added incentive to join and also builds confidence in how to use the new materials with impact.

Read our article for some [designer tips on creating great PowerPoint presentations](#)



We created **email templates for our employees' inevitable post-rebrand questions**. Anticipate that you're going to be asked questions like "where can I find the new PowerPoint templates?" and create standardized email templates that you can send back to people in an instant.

The email templates will always include a direct link to our detailed style guide. Doing this **saves so much time** for the marketing team and means that our inbox isn't as clogged with rebrand queries.



Kim Steinsberger, **Brand Manager, Corporate & Investment Banking** – UniCredit

Making your new brand assets accessible and easy to use

“



The secret to ensuring brand consistency is making it **easier for people to produce on-brand materials than off-brand.**

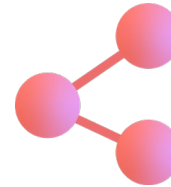


Léa Faust, **Head of Marketing – UpSlide**

When it comes to rebrands, it's easy to forget that it's not just the marketing teams who have a lot more work on their hands. Teams are likely to be harbouring a sense of dread about the additional work that the transition will cause them.

So its vital you spend time putting in place the right processes and infrastructure to enable them to easily access and use their new materials, without disrupting their workflow.

Some things which work well in our experience:



Creating a useable brand hub

It's obviously a good idea to have a central hub where you house all of your useful brand assets and guidelines.

But make sure you choose somewhere which makes most sense for the people who are going to use it – there's no point adding it to your intranet if teams spend most of their time on Trello or Notion, of they'd be more comfortable navigating a SharePoint site.

“



We created a **brand guidelines hub** on our SharePoint, which acts as a **central source of truth** for the rebrand – everything they need to know is in one place.

The page tells the story of our new brand, **how to interpret it, where to access** the rebranded materials, and how best to use them to produce **high-quality documents.**



Ollie Syed, **Creative Services Manager – Apax Partners**



Kim Steinsberger,
Brand Manager, Corporate & Investment Banking
UniCredit



You'll need to **create a style guide to communicate the new brand to your teams** whenever you rebrand a business.

In this style guide, you have to go into incredible levels of detail about your new brand. Provide your teams with information on line spacing, text box sizes, recommended font sizes, color palettes etc. Don't leave any detail out. This way, everyone will have access to everything they need to know, and it **leaves no room for confusion.**



Customized brand guidelines and examples

Of course, it's necessary to have a brand handbook which covers all bases when it comes to your new brand identity. However, for most teams, they'll realistically only ever need to be aware of a few key elements, and it's unlikely they'll want to flick through 50+ pages of in-depth guidance on how much white space to include around your logo.

So, create customized, shorter versions for the teams who need them most. For client-facing teams, they may only care about the elements relating to creating PowerPoint presentations or making sure their charts and tables are on-brand in Excel.

So, a one-pager or one to two slides will suffice and make them much more likely to use the guidelines.



Create template documents

If your teams create similar documents each day, you can create template documents and make them available as default templates in Word or PowerPoint. You could even save your concise brand guidelines and top tips for slide design as part of this as they can just be deleted by the users before sending.

For some guidance on how to do this, take a look at our article on [how to rebrand your PowerPoint template.](#)

Relying on your brand ambassadors

Remember your brand ambassadors? This is where they can really come in handy. Make sure you've selected advocates from each key area of the business, and from all of your office locations. You need some strong communicators who have a keen interest or investment in branding related topics. Here are a few different ways they can help:



Propagate the message

In big, multinational organizations it's impossible to reach everyone with your messages regarding the new brand. If you equip them well enough, ambassadors should be able to disseminate key messages to their teams, for example by joining existing meetings to make sure the rebrand is high on the agenda.



Give day-to-day support

You're also unlikely to be able to provide support to everyone who will need it. So, position your brand ambassadors as the go-to people on the ground for brand-related questions and support. Add them all into a Teams chat so they can ask you – or each other – for support.



Provide a feedback loop

They can also act as your eyes and ears on the ground, taking the temperature, flagging any issues, challenges or feedback coming from the front line. This will help you identify any issues early on and fix them quickly.

Use a tool to help you roll out your new brand

Using the right brand management software can take care of much of the above for you, making the adoption of your new brand much more efficient for you as marketers, and for your business teams trying to implement it.

UpSlide is a branding and productivity solution for Microsoft Office users, and helps you ensure adoption of your rebrand by:

- ✓ Ensuring your new branded templates, fonts, themes and colors are set for your entire business - without the need for IT to get involved
- ✓ Embedding a central [Content Library](#), across Microsoft Office, for teams to access your newly branded slides, decks and visual assets
- ✓ Allowing users to apply your new brand colors and formatting instantly to graphs, charts, and tables in Excel, with [Smart Format](#)
- ✓ Performing instant presentation audits; [Slide Check](#) will pick up on outdated content, off-brand fonts and colors and other errors such as misalignments and placeholders
- ✓ It gives you, as a marketer, visibility on how your branded materials are being used in the field

[Discover more about how UpSlide can help, here>](#)



Sonal Hirani,
Marketing Director –
Forensic Risk Alliance



Any business considering a rebrand needs a tool like UpSlide. It played a key role in our visual transformation. There's no point in having a flawless new visual identity if your teams haven't got the tools to start implementing it right away. Plus, **UpSlide helps demonstrate the ROI of the rebrand to the business.**

We receive regular updates on how much time our teams are saving with the new templates, plus the adoption rates of new materials.



The external launch

The launch of your rebrand is a huge opportunity to strengthen relationships with existing clients, and grab the attention of potential prospects, partners and potential employees. It's also a chance to have fun and get creative!

As we covered in the planning phase, your external communication strategy needs to be tailored to each specific group of stakeholders as your message will be slightly different for each. For example, for key clients, your objective may be to make sure they feel included and valued – that they don't feel neglected as the business takes a new direction.

Who	Key objective	Examples of how to communicate with them
Clients 	Create a sense of exclusivity, ensure they don't feel alienated	<ul style="list-style-type: none"> ⚡ Create a personalized video message from the CEO ⚡ Invite them to an exclusive launch event ⚡ Send out a PR box with rebranded gifts ⚡ Give them an exclusive preview of the new brand
Prospects 	Generate greater awareness of the brand amongst target audience	<ul style="list-style-type: none"> ⚡ Post a countdown and teaser posts on social media ⚡ Provide Sales teams with template emails and social media content to share/use (inc. profile background) ⚡ Create thought-leadership content ⚡ Sponsor an industry event to coincide with the launch
Other stakeholders	Make sure they understand the benefit and the objective behind the change	<ul style="list-style-type: none"> ⚡ Send out a tailored newsletter ⚡ Update them on the rebrand at a quarterly/bi-annual board/shareholders meeting ⚡ Create a brochure on the rebrand to send out to partners etc.

The external launch (continued)

With prospects, take advantage of this opportunity to generate greater brand awareness across your digital channels.

If you have decided to develop some new values (or even focus more on your existing ones), you could create some content in line with these and then launch targeted campaigns on LinkedIn or Google to reach prospects within your target demographic. Content like this can often make for interesting PR topics as well, so involve your agency or in-house PR team to get their perspective and advice.

It can be easy to make your communications all about you and your pride in the new rebrand, but remember to always make it clear to the intended audience **what's in it for them**.



“



I'd recommend getting as **creative as possible** with your official rebrand launch.

We created a **brand reel** that included a clip from our CEO explaining the story of the rebrand, why we chose to do it and what the new brand represents. We sent it out via email to key clients and stakeholders, and launched it on LinkedIn, Twitter and our website, **to get everyone on board with it from day one**.

The brand reel was a **success** and we had **positive client feedback**.



Joanna Osborne,
Head of Marketing –
Singer Capital Markets

Part 6 Measuring the success of your rebrand



One of the most difficult elements of the project is trying to understand the impact your rebrand has had, and being able to establish some kind of ROI to present to senior stakeholders. If, as outlined at the beginning, you have clearly defined your objectives and measures of success, then this will be much easier.

“



Post-launch, we measured the success of our rebrand by **collecting qualitative feedback** from internal teams, clients and wider stakeholders to find out:

- ⚡ **Visually** – does it successfully represent our business vision?
- ⚡ **Verbally** – do people understand what our brand stands for?
- ⚡ **Technically** – is everything working well and has there been high adoption of materials?

These three pillars will enable you to work out if you've delivered a successful rebrand.



Joanna Osborne,
Head of Marketing
Singer Capital Markets

The results

This stage could last anywhere from six months to five years – it's up to you and your key stakeholders to define this. Agree with your brand committee at which points you want to measure the results, and set key milestones for different objectives if needed.

For example:

- ⚡ By 1-month post-launch, you might want to ensure all teams are using the new brand consistently.
- ⚡ By six months, you might be hoping to start seeing improved perception of your brand (measured using focus group feedback)
- ⚡ By two years you might be hoping to have ensured that more inbound business is coming from your target region.



Many companies offer '**Brand Valuation**' services which assess the value of your brand based on a combination of factors. You could invest in this prior to your rebrand and then conduct a post-rebrand evaluation to establish the value added by your rebrand.

It's also important to remember that the launch is not the end destination; you need to make sure that the results and feedback you get from this initial launch is used to refine, improve and evolve your brand. Put in place strategies to ensure that you take the time to focus on this and prioritize it, as business as usual work will take over if you don't.

Conclusion

As mentioned throughout this eBook, a rebranding project is a complex and unique process for every business; there's no single 'best practice' way to do it. But there are some common elements which are at the heart of all the successful projects we've seen:

- ⚡ **Clear objectives:** having a very clear idea of what you're trying to achieve, from the outset, and using this as your guide
- ⚡ **Good communication:** devising a robust communication strategy tailored to each stakeholder, with clear and impactful messaging
- ⚡ **A multi-disciplinary team:** ensuring a good range of expertise and insight from people within, and outside of, the business
- ⚡ **The right tools:** taking advantage of technology to help you: from project management tools, to content creation software like UpSlide

For more advice on rebranding, and branding and design topics more generally, visit our [Content Hub](#).

Discover UpSlide

To hear from marketers at firms including [Forvis Mazars](#), [Coller Capital](#) and [Clarksons](#), who rely on UpSlide to help them ensure long-term brand efficiency and compliance, see our [Client Stories](#).

“

UpSlide has made everyone's life easier! We've seen immediate benefits and even after just one month, we can already see it's going to be a **hugely important tool for FRP**.



Laura West,
Former National Marketing Director – **FRP Advisory**

We'd like to say a big **thank you** to some of our clients who have shared their words of wisdom in this eBook:



Kim Steinsberger,
Brand Manager, Corporate &
Investment Banking
– **UniCredit**



Lorraine Hackett,
Group Brand & Communications
Director – **Forvis Mazars UK**



Sonal Hirani,
Marketing Director
– **Forensic Risk Alliance**



Joanna Osborne,
Head of Marketing –
Singer Capital Markets



Ollie Syed, Creative
Services Manager –
Apax Partners



Thank you

We hope you've found this guide insightful and useful. If you want to speak with one of our rebranding experts about how we can support you in ensuring a successful rollout and adoption of your new brand, [get in touch!](#)

Other ways to get in touch:



www.upslide.net/en



linkedin.com/upslide

