THE CUMBERBATCH GROUP

Brand Direction Workbook

A structured framework for defining a credible market position, focused message, distinctive identity, and consistent customer experience

Business or brand	
Workbook lead	
Date prepared	
Market or geography	
Version	

How to use this workbook

Work through the sections in sequence and base each decision on customer, market, and business evidence. The goal is not merely to select visual preferences. It is to establish the strategic direction that should guide naming, messaging, design, marketing, sales, service, and future brand decisions.

01 BUSINESS AND BRAND FOUNDATION

Clarify what the business does, why it matters, what it is building, and how the brand must support the enterprise strategy.

Foundation element	Current definition	Evidence or source
Business purpose		
Mission		
Vision		
Primary offer		
Business model		
Growth priority		

Why this brand needs clearer direction now

Business decision the brand must help customers make

02 PRIORITY AUDIENCE

Define the people the brand must understand and influence, including their circumstances, priorities, expectations, and buying behavior.

Audience factor	Primary audience	Secondary audience
Who they are		
Situation or stage		
Need or problem		
Desired outcome		
Decision criteria		
Barrier or concern		
Influencers		
Where they seek information		

Audience the brand is not designed to serve

Most important audience truth the brand must respect

03 CUSTOMER INSIGHT

Identify the functional, emotional, social, and practical forces shaping the customer's decision.

Insight area	What the customer thinks, feels, or does	Evidence
Current frustration		
Desired progress		
Fear or perceived risk		
Existing alternative		
Reason to change		
Reason to delay		
Signal of trust		
Definition of success		

Most useful customer insight for shaping the brand

Assumption that still requires validation

04 MARKET AND COMPETITIVE CONTEXT

Determine how the market is structured, what competitors claim, and where credible space may be available.

Market factor	Observation	Implication for the brand
Category expectations		
Common promises		
Visual conventions		
Customer dissatisfaction		
Competitor strength		
Competitor weakness		
Emerging change		
Unoccupied opportunity		

What the brand must do to be recognizable within the category

What the brand must do differently to be meaningfully distinctive

05 BRAND POSITIONING

Choose the specific position the brand can credibly own in the mind of the priority customer.

Positioning component	Working direction
Priority customer	
Market or category	
Most important need	
Distinctive value	
Primary alternative	
Reason to believe	
Business advantage	

Positioning statement

Position the brand should deliberately avoid

06 BRAND PROMISE AND VALUE

Translate the position into a clear promise supported by practical, emotional, and longer-term value.

Value level	Customer value	Evidence or proof
Functional value		
Economic value		
Emotional value		
Social value		
Long-term value		

Core brand promise

Conditions required to keep the promise

Proof that makes the promise credible

07 BRAND CHARACTER AND PERSONALITY

Define the human qualities the brand should consistently express and the behaviors that make those qualities believable.

Trait	What it means for this brand	What it does not mean	Behavioral evidence

Three words the audience should use to describe the brand

Behavior that would contradict the intended character

08 MESSAGING ARCHITECTURE

Organize the core message, supporting themes, proof, and calls to action so communication remains focused and consistent.

Message level	Message	Supporting proof
Core message		
Audience problem		
Brand solution		
Outcome		
Reason to believe		
Primary call to action		

Supporting theme	Purpose	Evidence or example

Message that must be understood first

09 VOICE AND LANGUAGE

Specify how the brand should sound across channels and establish language rules that protect clarity and credibility.

Voice quality	Use this approach	Avoid this approach	Example

Language element	Approved direction
Preferred terms	
Terms to avoid	
Sentence style	
Level of formality	
Use of technical language	
Calls to action	

Sample message written in the intended voice

10 BRAND STORY

Build a concise narrative that connects the customer's situation, the reason the brand exists, and the progress it helps create.

Story element	Narrative direction
Customer context	
Problem or tension	
Founding belief	
Brand role	
Approach	
Customer progress	
Future being built	

Short brand story

Detail that makes the story distinctive and authentic

11 NAME AND BRAND ARCHITECTURE

Clarify how the company, offers, products, divisions, and future extensions should relate to one another.

Brand or offer	Role	Audience	Relationship	Naming action
Parent brand				
Primary offer				
Secondary offer				
Division or platform				
Future extension				

Recommended architecture and rationale

Naming rules for future offers

Potential confusion to resolve

12 VISUAL DIRECTION

Translate the strategic position into a coherent visual system without reducing the brand to personal taste.

Visual element	Recommended direction	Reason	Avoid
Logo system			
Color			
Typography			
Photography			
Illustration and icons			
Layout and spacing			

Visual impression the brand should create immediately

Reference brands or visual territories and what to learn from them

13 BRAND EXPERIENCE AND TOUCHPOINTS

Ensure the intended position is expressed through actual customer interactions, not only communication and design.

Touchpoint	Desired experience	Current gap	Required change	Owner
Discovery				
Website or location				
Sales				
Purchase				
Onboarding				
Delivery				
Support				
Follow-up				

Moment that matters most to brand perception

Experience improvement required first

14 BRAND DIRECTION SUMMARY AND IMPLEMENTATION

Consolidate the decisions, identify required deliverables, assign ownership, and establish how the brand will be governed.

Direction element	Approved decision
Priority audience	
Position	
Promise	
Personality	
Core message	
Voice	
Visual direction	
Experience priority	

Implementation action	Owner	Due date	Approval or evidence

Final approval, approving authority, and date