This worksheet is a step-by-step guide to help you start crafting your brand and elevator speech. While it is by no means all-inclusive, these exercises will get you started.

Building a brand is a long-term strategic process of developing the messaging that you want to use to succinctly describe you and your business. Your brand defines who you are as a company, where you stand in the market, what you do, who you serve, where you’re going in the future, and — most importantly — helps establish lasting relationships with your customers.

**What is a brand?**

* It’s your customer’s overall perception and experience of your business.
* **It’s your business’ reputation, position, perception of value, and personality.**
* **It’s the important messaging that communicates your business.**
* It includes, but is not limited to, your logo, color palette, tag line, slogans, stories and digital assets such as your website and social media.

**What is an elevator speech?**

* It’s a brief, persuasive speech that sparks interest in your business, project, service, idea, or product.
* It should be interesting, memorable, and succinct.
* It’s short, just 20 to 30 seconds.
* It explains who you are, what you do, why you are different, and what’s in it for them – why they should do business with you.

|  |
| --- |
|  **WORKSHEET TIPS**Start by going through the worksheet and filling in as many boxes as you can. *Don’t feel that you need to complete every box or even have fully thought-out responses right now.* Crafting your brand and elevator speech is not quick, one and done, exercise. It is an iterative process that you will tweak, refine, and redo your messages as your business grows. The most important step is to get started now. Then, on a monthly or quarterly basis, revisit, review, and refine your worksheet! One more thing! Try to see things from your customer’s point of view. Always! What do your customers need that you can provide?***\*\*As you start completing the template, the boxes will automatically expand to fit all of your important thoughts and ideas.*** |

**YOUR NAME/COMPANY NAME or IDEA**

|  |  |
| --- | --- |
| **WHAT IS YOUR OFFER?***Product/Service Description*Describe what you want to do. Write out a full description of the product(s) and/or service(s) you are going to offer. List as much as you know right now.  | **WHAT’S YOUR DRIVING FORCE?***Your Mission*Describe the reason you are passionate about your business idea. Why is it important to you? **This is your why; the reason you serve.****Simon Sinek's TED talk** **describes WHY it matters.**  |
| **WHAT URGENT PROBLEM ARE YOU SOLVING?***Why Customers Want to* ***Pay*** *for your Offer* Put yourself in your future customer’s shoes. Describe the painful, urgent, or annoying problem that you can confidently solve? * Can you prevent problems or provide peace of mind?
* Will you help save time and/or money?
* Can your product/service do something that others can’t?
* Does your product/service make a process more efficient or effective?

Describe why people should **act now** to engage with your business or product?  | **WHO’S YOUR IDEAL CUSTOMER?***Target Audience*If you try to appeal to everyone, your business or product will get lost in the noise. So, describe your **perfect** customer — the one who wants and needs what your business has to offer ***right now***. Even just a demographic may be too broad. Be as specific as possible. |
| **WHAT DOES YOUR PRODUCT OR SERVICE DO?***Offer Features*List what your product or service does and how it works. Features are aspects of your product or service that can be technicalFor example, the features for an accountant might be, * Bookkeeping
* Accounts receivable invoicing
* Financial reporting
* Tax preparation and filing
* Available nights and weekends
 | **HOW DOES IT HELP YOUR CUSTOMER?***Offer Benefits***D**escribe why each feature matters to your customers. For example, the benefits for each feature the accountant offer might be:* Expert and accurate financial records
* Fees owed collected on time
* Assurance of financial compliance
* Professional and easy tax submissions
* Hours that fit your busy schedule.

**Your Offer Pillars** are a blend of your features and benefits, mostly benefits. It’s the reasons your customers will buy from you. Example: Experienced, Convenient, Affordable. What are your three offer pillars? |
| **SOLVE THE PROBLEM***Offer Value*A good solution provides value. Describe the ultimate value your product or service offers your customers. Think about how your business improves your customers’ lives. In B2B, it’s usually about outcomes or results such as improving revenue or saving time/money. In B2C, it is usually associated with an enhanced experience or cost/time savings.  | *Price is what your pay.**Value is what you get.** Warren Buffett
 |
| **WHAT RETURN ON INVESTMENT DO YOU PROVIDE?***Value Proposition* Your unique value proposition (UVP) is your promise to your customers. It is a positioning statement that explains how your offer solves your customer’s problem, what specific benefits it provides, and why customers should choose you over your competition. In a nutshell, your UVP covers how your product or service works, what makes it valuable, and why it is better than the rest.**Sample UVPs:*** **Fort Hunt Preschool** is a community of families who believe that children learn best in a safe, nurturing environment, supported by a cooperative partnership of parents and teachers.
* **Discover Books** is dedicated to the sale of gently used books to support our goal of fighting global illiteracy and to Let the Stories Live On. We fundamentally believe that books exist to be read.
* **Allison Barnes Events.** From consulting to full planning and design, Allison and her team are here to alleviate the stress that surrounds wedding planning...after all, thoughtful and stylish events don't just happen, they're planned!
* **Opterre**. Where technology, outsourcing and corporate takeovers threaten to eliminate jobs, we help experienced people take their skills on a new path as independent consultants.

**Now it’s your turn!** Write out a draft UVP. This may change over time as you gain more feedback from customers or as your business evolves. |
| **WHAT MAKES YOU UNIQUE?***Differentiation*What makes you or your product/service stand out from the competition? List the qualities or attributes do you have that makes your business unique?Consider:* Do you have a special communication skill?
* Is your process or product unique?
* Do you have certifications or special training, or experience?
* Is your business a woman, minority, veteran, or service-disabled veteran-owned?
* Are you an expert or thought leader in this field?
 | **WHAT SHOULD YOUR TO CUSTOMERS THINK?***Positioning* What qualities do you want associated with your brand? Affordable? Trustworthy? High quality? Convenient? Other??Your messages should make an emotional as well as an intellectual connection. * Are you the affordable dog groomer with flexible appointments or the high-end groomer who styles show dogs?
* Are you the jack-of-all-trades accountant for small businesses or the specialized financial analyst who is expert in mergers and acquisitions?
 |
| **MAKE YOUR CASE** *Proof Points*Customers are generally skeptical of unsubstantiated claims. Proof is a necessary component of validating your capabilities, so customers don’t have to just take your word for it.  Proof can be in the form of research, results of a product or service trial, testimonials, case studies or an award of recognition. What evidence can you offer to back up your claims?  If you don’t have any proof points as you get started, that’s ok! Just make sure to collect them as your business grows. | **RESONATE WITH YOUR CUSTOMERS***Key Brand Messages*List the clear and concise messages that you will use consistently in association with your business or product to support your brand using the qualities you’ve identified. Focus on the benefits to your customer. Don’t worry about being perfect. Use an active voice, compelling adjectives, action words, and write as if you are speaking to a customer! |
| **SO, TELL ME ABOUT YOUR BUSINESS***Your Elevator Speech*Now you get to pull everything that you’ve been working on into an elevator speech — a compelling yet, concise statement - just 20 to 30 seconds – to provoke interest and start a conversation about your business. Incorporate aspects of your UVP, brand pillars and differentiation.Having a good elevator speech ready can help you make a good first impression and generate interest in your business. Remember, this is something you should be able to easily tell someone about you and/or your products or services. **It is not a sales pitch. It is your business introduction.**Start drafting your elevator speech using the elements you’ve built out above. **Your elevator speech will evolve along with your business.** You may have multiple “speeches” targeted to each audience you serve. (*Two examples are provided in the next box.)* |
| **TWO ELEVATOR SPEECH EXAMPLES** **The Elevator Speech: Chellie Campbell**"I'm Chellie Campbell and I treat money disorders: spending bulimia and income anorexia. My 8-week Financial Stress Reduction Workshop is designed to help you make more money and have more time off for fun. I'm also the author of three bestselling books, "The Wealthy Spirit," "Zero to Zillionaire" and "From Worry to Wealthy." So, if you're living on peanut butter and jelly and would like to afford deli, call Chellie!"**Why it works**Campbell's pitch conveys that taking her financial workshop might actually be fun. She always gets laughs and often gets prospective customers, who come talk with her after seeing her pitch. Campbell has been teaching her Financial Stress Reduction Workshop since 1990, thanks in part to her creative approach to a dry topic."I built my whole business from just giving my 30-second pitch at networking events," Campbell shared.**The Elevator Speech: Hux** "Hux is an online platform directly connecting local consumers with house cleaners. With Hux, you can easily compare local house cleaners on total price, reviews, availability and instantly book a service. Our technology empowers local house cleaners by replacing costly overhead found in the traditional service industry and makes it easy for consumers to book services online in just two minutes. Just think of us as the Uber of house cleaning!"**Why it works**Plenty of businesses want to be the Uber of their industry–so much so that the comparison can be a cop-out for an original pitch. However, the statement explains the platform on its own merits first, describing its benefits for both the consumers and housecleaners who use the service. But by adding the Uber line helps drive home the platform's ease of use and instant booking features. |
| **REMEMBER…**1. **Don’t try to be everything to everyone.** You want a well-defined, niche audience. Even if someone isn’t your target, they may know someone who is! Brands that target everyone, connect with no one. The biggest mistake businesses make is casting too wide a net for fear of leaving anyone out. Women 25 to 54 is not a valid target segment, it’s a census box. More niche: Women 25 to 54 who need a flexible workout option that fits with their unpredictable schedules.
2. **Differentiate yourself from the pack.** Your elevator speech should be something unique, unexpected, and meaningful that can set you apart from competitors or alternatives.
3. **Make a connection.** Start establishing trust by being unabashedly, authentically yourself. But be sure to create compelling messages that **resonate with your customers**, not just you. Practice your elevator speech in front of a mirror until the words sound effortless and natural. Use your elevator speech at networking events to become more comfortable using with other people. As a solo entrepreneur, YOU are your business! Present yourself as a credible and trustworthy professional so that people will say, “I want to hire you or refer you to someone I know!”
 |