5FORESTS

So you're thinking about undertaking a 5forests brand workshop? Exciting! I know this is a big step, and I want you to feel 100% confident in your decision. Let me share with you some details about what you can expect.

Our brand workshop takes 3 days, during which time we meet jointly or severally with your stakeholders. Ideally, we would do this together as a team, but sometimes people want a bit of privacy to speak freely about their views of success. I aim to be pretty Socratic in my approach, mainly because I deal with passionate, creative people who have their own views on how things need to be done.

We begin by delving into your business goals: growth, revenue, prestige, retirement planning, exit strategy, world domination. We get to know the culture and history of your business (which, as an aside, is super useful to understanding personal dynamics within the team). What are the real and perceived brand attributes: what do we think the brand stands for? Is this what customers experiencing? What are the customer touchpoints (where do they "meet" the brand?) and are those brand attributes reflected in every customer experience?

We will explore the sales history and process, and together work on a (non-stuffy) analysis of strengths and weaknesses. This is useful for teams because sometimes tasks can be shuffled for happier team members and improved productivity. We'll spend a fair bit of time reviewing the business strategy to date (many wine brands have none!) and how that has been successful or painful.

We'll have an honest discussion about the changing market and if your brand is remaining relevant. (FYI, this is the number one reason I get called in.) What is happening with competition, what do WE know is working (because we see a lot of data), and what are the common weaknesses? Where does the team need upskilling or advice?

Whew! And then, we start to create a plan. How do you best use your resources to attain your goals? We look at potential timelines, investments, staff training, outsourcing. If you have a limited budget, how might you bootstrap through phases of growth? If you have limited time, what is feasible?

Finally, I always make sure that workshop clients walk away with an actionable plan that they can get started on immediately. When we've wrapped, I personally produce each and every roadmap, your 15-20 page document to help you and your team stay on track, especially when overwhelm threatens to creep back in.

Have questions? Ask. I answer all my own email and I'm just a phone call away.

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brand workshop, sample agenda

clarify your goals

What does success look like? How will you recognize it? What brought you to this point? What does the future look like?

- ☐ Brand Audit
- ☐ Business Culture
- ☐ History & Early Expectations
- ☐ Key Products & Services
- ☐ Past/Existing Business Strategy
- ☐ Market Environment
- ☐ Competitive Landscape
- ☐ Research & Analysis, Internal
- ☐ Trends & Data, External
- ☐ SWOT
- ☐ Future-casting

1

make sense of your customers

Who are your customers? Who do they trust? How do they experience your brand? How do you add meaning to their lives?

- ☐ Psychographics
- ☐ Demographics
- ☐ Analytics
- ☐ Sales Channels
- ☐ Position & Placement
- ☐ Customer Experiences
- ☐ Email Journeys
- ☐ Social Media
- ☐ Search Engines
- ☐ Experiential Marketing
- ☐ Paid Advertising
- ☐ Word of Mouth
- ☐ Apps & Referral Engines

2

master your communications

What's your message? Is it consistent across your brand? Are you sharing it at the right time in the right place?

- ☐ Mission & Vision
- ☐ Core Values
- ☐ Brand Story
- ☐ Value Proposition
- ☐ Brand Attributes
- ☐ Differentiators
- ☐ Competitive Advantage
- ☐ Markets & Channels
- ☐ Services & Products
- ☐ Voice & Tone
- ☐ Copy & Content
- ☐ Visual Identity & Packaging

3

make a plan

What's next? How do you roll out? How do you stay on target? How do you evaluate & adapt?

- ☐ Audit Existing Content & Collateral
- ☐ Adapt Existing Marketing Plans
- ☐ Brainstorm with Stakeholders
- ☐ Assess Scalability
- ☐ Assess Sustainability
- ☐ Develop Flexible 12-Month Strategy
- ☐ Action Steps!
- ☐ Document
- ☐ Distribute
- ☐ Onboard
- ☐ Repeat

4

Find more resources @ 5forests.com.