

Brand Discovery Worksheet

*Protected personal information (PPI) of the client has been omitted per NDA restrictions

Define the Company/Organization:

[Client's existing website link]

In a single concise paragraph, define who you are and what you do — as if you are describing the company to a person for the first time.

[Client name] offers one-on-one financial coaching to women of color who are overwhelmed by their debt and need help organizing their finances. They also partner with high schools, universities, nonprofits, and corporate companies to lead financial literacy workshops for people from all backgrounds.

What We Do: (Technical) Describe what you do (factually) as opposed to why you do it.

[The client] teaches financial literacy to people. They talk about money mindset, budgeting, debt elimination, savings, emergency funds, intro to credit and intro to investing.

Who We Are: (Emotional and beliefs) This differs from “What we do” in that this is an emotional statement, not factual. Try to do this in a sentence or two.

[The client] wants to help people decrease their debt and increase their income and investments. They do this because [the client] wasn't taught much about finances until after they graduated from college. They then created a plan and paid off [amount of debt] in 3.5 years while [making significantly less than the amount of debt] per year.

Brand Reputation (Brand = your reputation)

Past Brand: What were you known for in the past?

N/A

Current Brand: What do potential customers know or think about your company?

[The client] is a trusted, understanding and passionate financial counselor and instructor. Their company spreads financial literacy, provides counseling services, and helps people build a money mindset.

Future Brand: Looking ahead, what perceptions would you like to shift
[The company name] will provide financial counseling and a companion mobile app to help customers manage their money wisely.

Target Audiences: List in order of importance. Try to put a percentage of importance on each one. Feel free to add more.

1. **Primary:**
 - a. Women of color who are overwhelmed by their debt/ finances
2. **Secondary:**
 - a. Women in general
3. **Tertiary:**
 - a. Debt-free seekers
 - b. Saving seekers
4. **Quaternary:**
 - a. Students (they don't know much about financial literacy and might need help with debt/ loans)

Potential sponsors/ partners (these are NOT users):

- Schools, universities
- Nonprofit organizations
- Established banks
- Corporate companies

High-level Goals: What is the website/app trying to achieve?

1. Increase users' income/ investments & decrease users' debt
2. Helping people gain financial literacy
3. Getting people to book a consultation with the client
4. Brand exposure
5. Inspiring/ empowering people (i.e. finance isn't something to fear)

Unique Value Proposition: What can you say that differentiates this company from all others?

What differentiates [the client] from other companies is [related to their personal background and identity]. They paid off [amount of debt] in about 3.5 years while making under [amount of budget] at the age of 25. The client also runs their own business full time.

Messaging: List your main messages as they relate to the target audiences and your goals. You must first try to solve your goals, and then do it in a way that appeals to each specific audience. (Belief, UVPs, what are you selling?)

Write these as a headline and subheadline:

1. Take control of your money
 - a. You can pay off your debt, and grow your savings at the same time
2. Conquer Your Debt
 - a. Say goodbye to student loans and hello to financial freedom with our expert strategies and support
3. Build Wealth, Build Confidence
 - a. Gain the knowledge and tools you need to break free from financial stress and build a secure future for yourself and loved ones
4. Transform your money mindset
 - a. Empower yourself to invest wisely with our intuitive financial app
 - b. We're here to help you achieve financial freedom one step at a time
5. Spark Conversations, Ignite Change
 - a. Be inspired by real success stories
 - b. Take charge of your financial future with our accessible platform
6. Join the Global Community
 - a. We're committed to educating others about financial literacy

Competition (or similar companies):

Companies:

- Banks that offer similar free services

People:

- Dave Ramsey
- Budgetnista

Competitor apps:

- Bank of America Life Plan
- Rocket Money
- GoodBudget
- You Need a Budget (YNAB)
- Honeydue

- Empower
- PocketGuard
- Quicken Simplifi/ Quicken Classic
- Monarch Money
- Albert
- Zeta
- Mint/ Credit Karma
- EveryDollar

Creative Likes: List creative elements that help support this brand.

- Minimalism/ clean professional colors/ photos
- Happy photos of real users/ target audience
- Illustrations of users
- Simple data visualizations
- Easy-to-understand guidance for use

Creative Dislikes: List things that will NOT work for this brand.

- Photos/ images that are not the target audience (i.e. very rich or wealthy users)
- Stay away from imagery that would stress or make the users feel unsafe (financial apps depend a lot on looking and feeling secure/ safe because users have to share their personal information)

Industry No-nos: Is there anything that you cannot do in this industry? For example, an alcoholic beverage company isn't allowed to use cartoon characters or imagery that could be considered targeting children.

- Financial apps must be free of intentionally misleading and deceitful practices or they risk losing trust and infringing on privacy/ security rights
 - Sensitive information such as banking/ cards and PPI (personally identifiable information) MUST be kept safe
 - What the app will do with the information must be understandable and transparent to users

(For more info on dark patterns in design:

<https://www.deceptive.design/types>)

Search Engine Optimization: What keyphrases are people using to find you?

- **From the client:**
 - Financial coach

- (personal identifiers) + financial coach
- **More keywords/ phrases:**
 - Coach/ advisor/ manager/ consultant/ counselor/ service/ helper
 - Financial literacy
 - Financial education
 - Finance/ financial coach
 - Debt advisor
 - Money manager
 - Money management service
 - Wealth manager
 - Budget coach/coaching
 - Budget planning
 - Retirement/ investment advisor/ planner
 - How to manage my money
 - How to calculate my debt
 - How to reduce my debt
 - How to grow my investments/ wealth
 - Guide to money management
 - Budget coaching services
 - Student debt advisor
- **Potential terms:**
 - Registered Investment Advisor (RIA)
 - Certified Financial Planner (CFP)
 - Chartered Financial Consultant (ChFC)
 - Chartered Financial Analyst (CFA)

Social Media Presence: Describe briefly some of the social channels this company uses and how you use them. How could we use social media more effectively?

- **LinkedIn:** [client's link]
- **Instagram:** [client's link]
- **TikTok:** [client's link]

Content: Copy, photos, videos, testimonials, data importing.

Web Host:

Domain Name Registrar:

Email Host: