



DEFINING AND TELLING YOUR STORY

by Christine Coletta | Owner, Okanagan Crush Pad
for FORTIFY

This session will help you understand the steps required to create a strong Brand Profile and write a comprehensive Marketing Plan.



- Every company can benefit from a solid plan; this is not just an exercise for big corporations.
- Smart plans will help you develop and define your products and services, in order to meet market demands.



WHAT IS REQUIRED

Two separate documents that help keep you on track as you create and execute marketing tactics throughout the year.



BRAND PROFILE (OR BRAND DNA)

Outlines your brand narrative; guides the visuals and language used to develop packaging and marketing materials.



MARKETING PLAN

States your business goals, marketing focus and strategy; also determines a set of tactics for a set period of time.

HOW?

- Plans can be created using professional consultants, done in-house or a combination of both.
- If using consultants, ensure that they have a clear understanding of the essence of what you wish to convey.
- When creating your plan, segregate yourself from the day-to-day operation. Easy to say, hard to do, but winter can be a good time to get this under way.
- Create a working team that will give you the support you need.

- Undertake the process one step at a time.
- Give yourself plenty of time to review and reflect. If you get this right, the results will stand the test of time.
- When you think you have nailed it, picture yourself in your tasting room or at a beer festival standing next to your product selling your wares. Does it feel authentic? Are you stumbling over the story?
- Do a trademark database search and a web search.

STEP 1 Create Brand Story

STEP 2 Develop Brand Profile

STEP 3 Write Marketing Plan



STEP 1 – CREATE A COMPELLING BRAND STORY

A key part of your brand profile is your story.

- Create an authentic story that sets you apart from your competitors.
- Articulate your story using narrative that encompasses the facts and feelings behind your brand.
- Put personality into it. Customers find it easier to relate to products associated with human personality and that can demonstrate positive influences.



BUILD BRANDS WITH PERSONALITY

Make your story short, emotion – evoking and interesting. The public wants to be able to wrap their head around your story quickly and get on to enjoying your product.

Don't wait until you've won a ring to play like it.



NO WALL FLOWER

'London Pride' (or Saxifraga x urbium to be precise).
A tough little perennial that grew throughout the Blitz,
popping up through the rubble like a beacon of hope,
and a fitting name for our ale.

Made of London

BREWED BESIDE THE THAMES



NIKE

JUST DO IT.

- high performance
- resilient
- strong



Don't wait until you've won a ring
to play like it.

 Just do it.

ROLEX

LIVE FOR GREATNESS

- influential
- wealthy
- sophisticated

LIVE FOR GREATNESS

EVERY ROLEX IS MADE FOR GREATNESS. THE MILGAUSS, INTRODUCED IN 1956, WAS DESIGNED TO MEET THE DEMANDS OF THE SCIENTIFIC COMMUNITY AND IS CAPABLE OF WITHSTANDING MAGNETIC FIELDS OF UP TO 1,000 GAUSS. AFTER RIGOROUS TESTING BY CERN ENGINEERS, IT EARNED ITS REPUTATION AS THE PERFECT MAGNETIC SHIELD. TODAY'S MILGAUSS FEATURES A PARACHROM HAIRSPRING THAT PROVIDES ADDITIONAL PROTECTION FROM THE EFFECTS OF MAGNETISM.

THE MILGAUSS




ROLEX

LONDON PRIDE

MADE OF LONDON

- tough
- persistent
- approachable

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STORY BUILDING CASE STUDY – PHILLIPS BREWERY

A GREAT OPENING LINE...

“It all began with a 27-year-old brewer, a windowless apartment, and a mountain of credit card debt.”



STORY BUILDING: 5 KEY COMPONENTS

1. CHARACTERS

Matt Phillips

2. SETTING

A small windowless apartment where Matt would brew by day and sleep by night.

3. PLOT

After several years of slugging it out in the brewing community, Matt decides it's time to make his own beer.

STORY BUILDING: 5 KEY COMPONENTS

4. CONFLICT

As great as his beer was, his business plan made no sense and no one would lend him money to start his venture.

5. RESOLUTION

Undaunted, Matt grabbed credit card applications on the way out of the bank, filled them out the same day, and Phillips Brewing Company got its humble beginnings on a mountain of credit card debt.

BRAND STORY GOALS

CONVEY FACTS AND FEELINGS IN A POWERFUL, POSITIVE WAY

Phillips' first brews were about as unconventional as his financing structure.

INFLUENCE YOUR CUSTOMERS TO BUY YOUR PRODUCT

The same renegade passion and creativity that drove a young brewer to start a brewery on credit cards continues to be the driving force everything that they do today.

BE GENUINE AND MODEST

Matt's beer was incredible, but his business sense was somewhat flat.

STEP 2 – DEVELOP BRAND PROFILE

Create a highly visual document that:

- Defines your product and helps you strengthen and communicate your identity.
- Outlines the shapes, colours, images, emotions, and feelings that you want to convey.



BRAND PROFILE SAMPLE INDEX

OBJECTIVE

BRAND OVERVIEW

Primary Target Group
Unique Selling Proposition
Brand Character

VISUAL INSPIRATION

Images
Shapes and Textures
Colours
Type Style

OUR CHARACTER

Values
Actions

BRAND IDENTIFICATION

Key Attributes
Functional Benefits
Emotional Benefits
Model Customer

BRAND STORY

Language
Key Words
Positioning
Tagline
Storyboard

DESIGN ELEMENTS

Label
Design Standards - outlines logo and design uses for third party users.

BRAND PROFILE SAMPLE PAGES

BRAND OVERVIEW



PRIMARY TARGET GROUP

People, who are conscious and exacting about what they consume and understand and value organics. Consumers who are willing to step outside the mainstream and to spend top dollar on a new discovery.

UNIQUE SELLING PROPOSITION

For knowledgeable wine drinkers who care how wine is made and what goes into their wines and make purchasing decisions in a similar way that they would buy organic foods.

BRAND CHARACTER

- Confident
- Adventurous
- Bold
- Compassionate
- Thoughtful

BRAND PROFILE SAMPLE PAGES

BRAND IDENTIFICATION



KEY ATTRIBUTES

- Organic certified wines made without additives or manipulation.
- Leading not imitating. A disrupter of the way wines from our region are viewed.
- Crafting wines that are proudly and authentically Okanagan.
- A reputation for innovation and risk taking.

FUNCTIONAL BENEFITS

- The largest producer of “natural” wine in the Okanagan.
- Small portfolio of reserve products – rare, hard to find.
- Wines intended for those who care about consuming healthy, quality products.
- Made from certified organic grapes at an organic certified wine facility.

EMOTIONAL BENEFITS

- The excitement of being part of a small group of people who have access to these wines and embrace and champion a new style for the Okanagan.
- Confirmation of their commitment to healthy lifestyle choices.
- The physical reward of enjoying the wine.
- Pride – of discovering and embracing a new premium Okanagan wine brand.
- Cult wine loyalty.

MODEL CUSTOMER

Consumers who look beyond hype and obvious claims of “sustainability” who want products that carry organic certification and understand the true value of that to the environment and their own health.

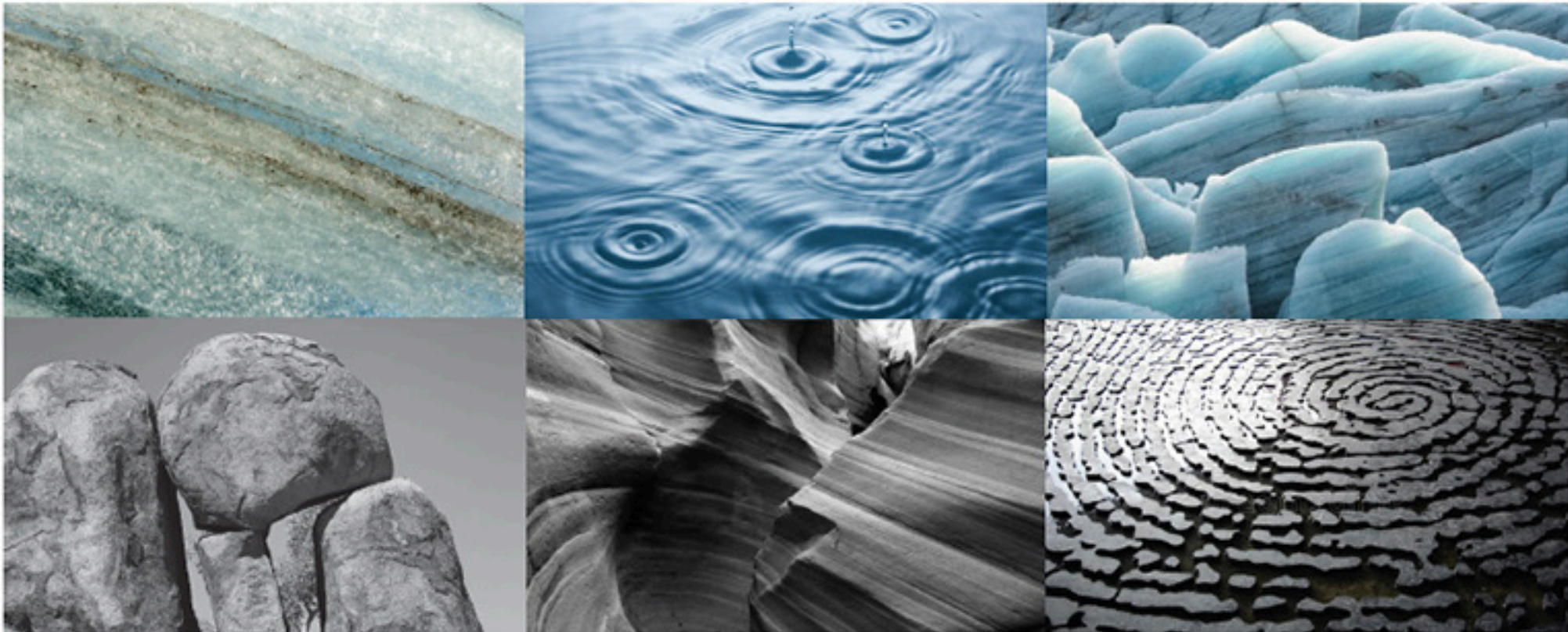
BRAND PROFILE SAMPLE PAGES

VISUAL INSPIRATION

IMAGES



SHAPES & TEXTURES



BRAND PROFILE SAMPLE PAGES

VISUAL INSPIRATION

COLOURS

White, black, grey, ice blue



TYPE STYLE



STEP 3 – WRITE MARKETING PLAN



WHY?

- The Plan will help you define your products and set you apart from your competitors.
- Helps you communicate your story so you can reach and retain customers.
- Keeps your team focused on core activities that are aligned with your vision.
- Gives your promotions and sales team very measurable objectives to meet.

SAMPLE INDEX

KEY CHALLENGES

What are we facing?

SITUATION ANALYSIS

What is the business and market landscape?

BUSINESS OBJECTIVES (MEASURABLE RESULTS)

What do we need to sell, and what are our revenue objectives?

MARKETING GOALS

What do we want to achieve?

SAMPLE INDEX

GUIDING PRINCIPLES

What do we believe in and stand for?

SWOT

Top Line – strengths, weaknesses, opportunities and threats.

MARKET ANALYSIS

Get real data; will the marketplace be able to support the business objectives?

COMPETITIVE SET

Which companies are you up against?

SAMPLE INDEX

PRODUCTS, VOLUMES & PRICE POINTS

SKU, production quantities, release dates and wholesale pricing.

SALES CHANNELS AND MARK UPS

LDB, private retail, DTC, ROC (rest of Canada), onsite shop, hospitality, export, etc.

ACTION PLAN

Who, what where and when. Assign tasks, put dates to the deliverables and have a set check in.

BUDGET

Set it and stick to it.

SAMPLE INDEX

TACTICS

How you are physically going to carry out this plan?

PROMOTIONS

In-store, LTO's, new/seasonal releases, contesting.

COMMUNICATIONS

Media relations, social media, trade/customer relations.

3RD PARTY RELATIONSHIPS

Food supplier, glassware, kitchen appliances, hotel chain.

CHARITABLE GIVING

Select one or two and create a multi-year program.

CLUB/DTC

Unique offerings, member benefits, member events.

FESTIVALS & EVENTS

Select regional and seasonal festivals and hold your own events to support new releases.

TOOLS & CONTENT

Photography, video footage, press kits, bios, tasting notes, story ideas.

SOME HANDY RESOURCES

INC.

www.inc.com/molly-reynolds/5-steps-to-building-a-strong-brand-identity-when-the-game-is-constantly-changing.html

WINEMAKERS' FEDERATION OF AUSTRALIA

www.wfa.org.au/assets/tourism/Business-Marketing-Plan.pdf

TRADE MARK SEARCH

www.ic.gc.ca/app/opic-cipo/trdmrks/srch/home

COLUMN FIVE MEDIA

www.columnfivemedia.com/how-to-create-a-brand-identity

HOW TO CREATE A BRAND DNA TO WIN

blog.daviesbdm.com/creating-a-brand-dna-to-win

6 BRANDS THAT MASTERED THE ART OF STORYTELLING

www.cmo.com/features/articles/2018/6/29/6-brands-that-have-mastered-the-art-of-storytelling



THANK YOU

Christine Coletta | Owner, Okanagan Crush Pad

Christine@ccltd.ca | 1 (250) 494-4445