



Brand road map for merging charities: Six steps to success

1. Initiation (Plan to succeed)

- **Build a great team**
Senior marcomms and fundraising personnel with genuine delegated authority, reporting to 'Project Board'.
- **Write a great brief**
Use attached IE's 'Brand Brief Template' (BBT) as a base document (link below)
- **Define your success measures**
Guidance in BBT. Success = minimise opposition, maximise integration and synergies. Create clarity of purpose. Drive up awareness. Deepen emotional engagement and brand loyalty. Improve fundraising appeal.
- **Engage the right agency partner(s)**
Guidance in BBT.

2. Engagement (Take your audiences with you)

- **Map your key stakeholders**
Who are they and what is their relative importance: 2 x 2 power/influence matrix helpful here. Plan how to keep them informed throughout process.
- **Conduct a listening exercise**
Cover off internal and external audiences using rigorous qualitative and quantitative research. Qual = 1 to 1 interviews and focus groups. These will generate deep insight in small numbers. Quant = e-surveys of larger sample groups to provide statistical integrity to qual findings. Research scale dependent upon organisational appetite for research, available budget and timescales.

3. Insight (Let the data decide)

- **Research analysis**
Two reports: one is a summary of all we've heard from every audience, but key one is top ten behaviour changing findings. Don't stop at 'here's what we heard', move onto 'so what?'.



- **Competitor mapping**
Consider competitive landscape, establish existing position, identify USPs and select desired future position.
- **Socialise the findings**
Clear research findings will directly drive all subsequent creative and marcomms activity – thus ensuring opposition is minimised. It's hard to argue with data.

4. Naming (Preserve equity. Signal change)

- **Existing names**
Ideally take baseline measure of existing brand equity (unprompted and prompted awareness) of both charities from which to measure progress.
- **Identify 'hygiene' words**
These are essential, descriptive words that define the 'space' in which you operate. E.g. for benevolent fund 'Sons & Friends of the Clergy', the only hygiene word was 'Clergy', and they renamed as 'Clergy Support Trust'.
- **Territories**
These are not geographic. We're looking for 'areas of meaning'. E.g. 'research' and 'care'. Naming is typically a workshop process followed by long/shortlisting. E.g. in the example above, the key territory was 'financial support', hence the inclusion of the words 'support' and 'trust', combined with the hygiene word 'Clergy'.
- **Testing**
Where multiple possible solutions remain, return to the people you spoke to in the research phase to test. A great opportunity to re-involve key audiences.

5. Key deliverables

- **Brand architecture**
What entities lie beneath the 'parent' brand? How can we organise them to ensure their proximity and relative importance are clear to outsiders?
- **Core beliefs and value proposition, messages and tone of voice**
Again, best undertaken through workshops and then over to copywriters. Messages should be: differentiated by audience; communicated with a defined tone of voice; and drive toward key calls to action.
- **Visual identity**
This goes way beyond logo into the realms of colours, fonts, use of imagery, textures, shapes etc. It must be 'digital first': optimised for web and social.
- **Brand guidelines**
These encapsulate your brand and enable you to police and protect all this work.



The brand and digital agency
for Charity, Health & Education.

- **Templates for key collateral**
Templates enable ongoing independence from brand agency: they typically include Word, PowerPoint and Adobe InDesign files.
- **Don't forget your website(s)**
Leaving your website (your key digital comms tool) until the new brand is ready to launch is a classic error. Far better to run the brand and website projects in parallel. Website research can be integrated into brand research (which delivers economies) and a single agency for brand and web can deliver a more integrated approach within a shorter timeline.

6. Launch (Don't overblow it)

- **Never let the rebrand become the headline**
No big launch parties. Launch your new strategy or your impact report, celebrate your merger and the expected efficiencies/enhanced impacts, but never celebrate your rebrand in and of itself. It will only attract criticism.
- **Focus ruthlessly upon your charitable purpose, your strategy and stories/statistics of impact.**

Useful further reading

- **IE's free book:** 'Not-for-profits: why, when and how to rebrand':
iebrand.co.uk/blog/free-not-profit-branding-white-paper
- **IE's Brand Brief Template:** iebrand.co.uk/blog/how-much-brand-research-enough
- **IE blog about research:** iebrand.co.uk/blog/how-much-brand-research-enough
- **IE blogs about naming:** iebrand.co.uk/blog/elton-or-reginald-when-right-time-risk-rebrand-or-even-name-change
iebrand.co.uk/blog/whats-name
- **IE case studies involving naming and branding:**
iebrand.co.uk/work/warrington-vale-royal-college
iebrand.co.uk/work/career-ready
iebrand.co.uk/work/clergy-support-trust
iebrand.co.uk/work/university-college-osteopathy
iebrand.co.uk/work/csh-surrey
iebrand.co.uk/work/sexwise