

A NOTE TO THE CEO

Imagine preparing for an important journey. Your organization is the traveler, and the intake/discovery process is like gathering a detailed map, compass, and provisions. Just as a traveler must understand the terrain, obstacles, and destinations ahead, we immerse ourselves in understanding your organization, audience, and competitive landscape. Without this preparation, the journey risks becoming aimless, leading to missed connections and lost opportunities. A thorough discovery process ensures we have the tools to navigate effectively, setting a course that resonates with those you serve and leaves a lasting impression.

This Intake/Discovery Process document provides a structured framework to gain a comprehensive understanding of the brand, its audience, core values, and competitive landscape. Each phase is designed to gather insights that shape strategic direction and ensure clear, compelling brand communication. By following these steps, teams can establish a foundational knowledge of the brand that supports cohesive, targeted strategies across all communication channels.

Phases Overview:

- 1. Audience Research**
Identify key audience segments to create resonant messaging. This phase analyzes demographics, psychographics, and behaviors to build detailed audience profiles, ensuring communications align with audience needs.
- 2. Brand Values and Brand Value Pyramid**
Clarify the brand's mission and values to form a strong messaging foundation. The team defines core values using the [Brand Value Pyramid](#), identifying what matters most to customers and differentiates the brand.
- 3. Competitive Landscape Analysis**
Understand market position and find differentiation opportunities. This phase assesses competitors to identify strengths, weaknesses, and gaps, informing strategies that highlight the brand's unique strengths.
- 4. Documentation and Validation**
Consolidate findings and align with stakeholders. Insights are compiled into a discovery document, validated with stakeholders, and finalized to ensure consistent communication that reflects brand values and strategic goals.

Outcome: The Intake/Discovery Process enables teams to craft a well-informed, strategic approach to brand communication. By covering these core areas, the team ensures that all communication reflects the brand's values, meets audience needs, and stands out within the competitive landscape, establishing a cohesive direction for impactful brand alignment and engagement.

PHASE 1

Audience Research

Objective: Identify and document key audience segments and develop detailed profiles to guide messaging and engagement.

1. Define Target Audience Segments
 - Identify Key Demographics and Psychographics: Break down the audience by age, gender, location, household income, and primary needs. Assess the main interests and characteristics of each segment.
 - Identify Audience Pain Points and Interaction Preferences: Focus on the specific challenges each audience segment faces and their expectations for interactions with the organization. Document any particular needs or pain points that should be addressed in the campaign.
 - Develop Audience Profiles: Create actionable profiles, assigning relatable names to each persona for ease of reference. Each profile should represent the unique preferences, concerns, and values of the audience.
2. Example Audience Profile: Avery and Ashton
 - Professional Couple, Late 20s
 - HHI: \$150K
 - Avery, a financial analyst, and Ashton, a marketing specialist, live in Tampa, Florida. Both are focused on building their careers but value weekends as time to unwind and connect with their community. They enjoy family gatherings, exploring local restaurants, and spending time outdoors, especially at the beach or local parks. Faith and family are central to their lives, and they prioritize conservative values like stability, responsibility, and a strong sense of community.
 - Concerns
 - Balancing Convenience with Quality: They seek a community center with flexible hours and accessible classes, appreciating quality instruction without extensive commitment requirements.
 - Family-Oriented and Supportive Environment: They value a welcoming, family-friendly environment and are cautious of places that feel exclusive or lack genuine social connections.
 - Local and Community Engagement: They are drawn to centers that support local businesses, host family-centered events, and offer volunteer opportunities within the Tampa area, such as holiday gatherings or faith-based events.

PHASE 1 (continued) Audience Research

3. Analyze Audience Behavior
 - Identify Engagement Preferences: Determine preferred communication channels (e.g., social media, email) and the best messaging style for each audience segment.
 - Document Behavioral Insights: Capture common interaction patterns, triggers, and responses to messaging to shape the approach to each profile.

PHASE 2 Brand Values and Brand Value Pyramid

Objective: Clarify the brand's mission and values to shape messaging and ensure alignment with the target audience.

1. Define Brand Mission and Core Values
 - Mission, Vision, and Purpose: Review the brand's mission, vision, and purpose, assessing how these reflect the brand's direction. Ensure core values are well-defined and aligned with the target audience's expectations and the brand's strategic goals.
2. Introduction to the Brand Value Pyramid: The [Brand Value Pyramid](#), based on Harvard Business Review's "Elements of Value," categorizes value into four levels: Functional, Emotional, Life-Changing, and Social Impact. This model allows us to identify and focus on the values that matter most to our audience, creating a brand message that resonates deeply.

Brand values play a foundational role in every aspect of your communication. They provide insights into why your customer chooses to spend their money with you. These values give language to why someone would choose you over your competition and clarify for your organization what actually matters most to your audience. Most internal teams and brands struggle to avoid talking about what is important to them and remember to talk about what is important to their audience. The values selected in your roadmap should be a sniper-like attack on communicating a message that will win over your current and future customers. They serve as key talking points that align your team's effort and ensure consistency across all touchpoints, creating a cohesive and compelling narrative that sets you apart.

- Process Task: Build the Brand Value Pyramid by selecting elements within each of the four sections (Functional, Emotional, Life-Changing, and Social Impact). For each element chosen, document why it represents a Customer Brand Value and how it connects to the audience's needs and motivations.

PHASE 3

Competitive Landscape Analysis

Objective: Identify competitors, assess their strengths and weaknesses, and find opportunities for strategic differentiation.

1. Research Key Competitors
 - Identify Major Competitors: Profile key competitors by noting their branding approach, audience positioning, and notable strengths and weaknesses. Include essential details like location, website, and overall reputation.
 - Benchmark Competitor Successes: Identify successful aspects of competitor strategies and analyze areas where the brand can differentiate.
2. Conduct Market Gap Analysis
 - Identify Unmet Needs: Determine areas where competitors fall short and where the brand can fulfill unmet audience needs. Look for specific market gaps or opportunities for unique positioning.
 - Insights for Creative Strategy: Summarize key competitive insights that should inform creative decisions. Highlight how the brand can fill gaps and ensure distinct positioning to stand out in the market.

PHASE 4

Documentation and Validation

Objective: Consolidate findings into a comprehensive discovery document and validate insights with stakeholders to ensure alignment.

1. Compile Discovery Document
 - Consolidate Insights: Gather all findings from audience research, brand values, and competitor analysis into a single discovery document.
 - Structure Key Sections: Ensure the document includes the following:
 - Audience Profiles: Detailed personas for each target segment, including pain points and interaction preferences.
 - Brand Values and Brand Value Pyramid: Summary of core values, brand value pyramid elements, and foundational elements of communication.
 - Competitive Analysis: Overview of competitors, market gaps, and insights for creative strategy.
 - Positioning Strategy: Initial recommendations for standing out in the market.
2. Present for Stakeholder Validation
 - Share Findings: Present the discovery document to relevant stakeholders for feedback and validation. Focus on confirming alignment with the brand's mission and strategic goals.
 - Incorporate Feedback: Adjust insights and strategies based on stakeholder input, ensuring the final document fully reflects the brand's direction and audience needs.

PHASE 4

Documentation and Validation

3. Finalize Discovery and Outline Next Steps
 - Complete Document: Finalize the discovery document to serve as the reference for strategic planning and campaign development.
 - Define Next Steps: Clarify immediate next steps, including timelines, objectives, and key responsibilities to ensure a smooth transition into strategy development.

PHASE 5

Quality Control Checklist

To ensure each section meets quality standards, use this checklist before finalizing the discovery document:

- Audience Profiles: Each profile includes demographics, values, key concerns, and behavioral insights.
- Brand Values and Brand Value Pyramid: Values and differentiators are clearly articulated and aligned with audience expectations.
- Competitive Analysis: Competitors are well-researched, with gaps and opportunities identified.
- Positioning Strategy: Recommendations align with the brand's core values and address unique audience needs.

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