Checklist:

How to spread your brand investment

through employees who know how to use the brand

Templafy

INTRODUCTION

You're working with a strong and valuable brand. We don't need to convince you of the importance of brand identity and brand consistency. You know the value of it, and you've most likely witnessed it in:

- **increased customer loyalty, credibility and competitiveness**
- **that it's easier to introduce new products to a market that trusts your brand**

Your employees are brand ambassadors, whether they are aware of it or not. Some are more directly the face and voice of the brand – **consultants, marketers, customer success, service,** and **sales teams**, while others are more indirect ambassadors, like **developers** and **financial teams.**

All employees are crucial to the success of a company's branding. Whether sending emails, presenting sales pitches, networking at an event, or designing social media assets; it's key that internal teams are aligned with your brand identity and have the tools they need to remain on-brand.

INTRODUCTION

66%

of marketing decision makers

will invest more in their brands in 2019

In **Bynder's** freshly released State of Branding Report, it's shown that **66,5% of marketing decision-makers in the UK and US** are planning to invest more in their brands in 2019 compared to 2018. They are specifically planning to spend more on branded visual content, with the main reason being increased visibility and engagement among their target audiences (41.6%).

INTRODUCTION

When investing more in the brand, it's important to know how to gain business value from the investment made. There's plenty of channels and tactics to succeed with this, but one huge, and often underestimated, potential lies in employees.

The question is: how can you and your team help employees to spread the brand value, by using the brand and brand assets in an efficient and consistent way?

In this checklist we focus on three main rules to get you started:

1

SIMPLE ACCESS

How employees use the brand and work with it.

2

ASSISTED ASSEMBLY

Why every touchpoint with the brand matters.

3

VALIDATION

How to eliminate off-brand with automation.

We hope you find this checklist useful and get ideas on how to even further accelerate your brand investment through all employees.

Christian Lund,
Co-founder, Templafy

1 SIMPLE ACCESS

Your employees love the brand, but not all of them know how to use it. Most of the interaction they have with the brand is when they produce and reuse different brand assets. On a day-to-day basis, this can be creating proposals, emails, contracts, and presentations.

Take a moment and evaluate how easy it is for your employees to work with the brand.

- Do all employees know the vision and mission of the business?
- Do you have compelling and relevant branded content for employees to share?
- Can employees access the content easily?
- Does your tech stack support efficient ways to work with brand assets?

1 SIMPLE ACCESS

1. Do all employees know the vision and mission of the business?

These statements might live on your corporate website but are hollow if employees aren't aware or actively engaging with them. Get insights on how people would describe **"who we are," "what we do"** and **"why."**

One option is to start with certain teams, for example from a specific country and within a specific function. Engage team leaders and managers to get people onboard. Explain to them why you ask and why it matters for the company and for them. You might be surprised by the variety of answers.

>> The more variety and range in the answers, the more your leadership and managers need to align again and internally communicate the value the company brings to customers.

2. Do you have compelling and relevant branded content for employees to share?

It's crucial that the content on your website is aligned with your value proposition and brand identity. To assess this, engage your content managers or brand managers to make a content audit and list the kinds of content you have, in which formats, where it is published, and to whom it is targeted. Evaluate if the content is up-to-date and supports your content strategy.

3. Can employees access the content easily?

Whether it's blog posts, sales decks, templates for contracts, Excel calculators for quotes, Word-documents, customer case studies or white papers; employees should be able to have **seamless access** to all relevant content assets and templates to provide consistently on-brand communications.

What is your current solution to **distribute templates** and document content across the company? Is the current solution or the process efficient? Talk with your team and colleagues and get feedback. All brand assets should be accessible where your employees work, whether it's at the office, from home or when traveling.

>>> This is where things can get messy: if employees don't know where to find documents and templates, how to use them and modify them into certain customer segments, they'll end up using a lot of their resources to find or make them by themselves. From your perspective, this is bad for brand consistency and you might end up losing control of the brand assets you and your team worked so hard to create for your business.

Bringing the brand close to the users inside the applications they use is key when working on aligning all employees with the brand.

4. Does your tech stack support efficient ways to work with brand assets?

The right technology can simplify workflows and processes, saving your employees time and boosting productivity. On average, professionals spend **nearly half their workday** searching for information and take a whopping 18 minutes to locate a single document. This accounts for quite a productivity loss in an organization.

At the same time, technology can enable more personalized content to prospects and customers.

Bynder: exceptionally useful when managing and connecting your visual assets with all employees
Dropbox: for sharing and accessing documents company-wide
Templafy: a platform to manage, dynamically update and share all documents and brand assets throughout the organization.

2 ASSISTED ASSEMBLY

When building and maintaining a brand, even small details matter.

A brand's image is made up of hundreds of interlinked elements. So, the biggest mistake a company can make is to only focus on hero visual assets and to ignore seemingly smaller details.

Which touchpoints with clients and prospects might be overlooked at your company?

- Email templates
- Contracts, proposals & sales collateral
- Email signatures

2 ASSISTED ASSEMBLY

Employee communications are crucial to the reputation of companies, yet this is often one of the hardest areas for branding and compliance teams to govern.

The more you can assist the process and automate how the brand is being used; the less your employees need to remember the rules to be able to follow them.

>>> Company email signatures are prime examples of an overlooked everyday customer touchpoint.

Recently, we worked with **a leading Scandinavian insurance company** to address their email signature compliance issues. With more than **50,000 outgoing emails per day** and no visual streamlining of **Office 365 email signatures**, the insurance provider's brand consistency was suffering in customer-facing business communications.

As a company benchmarked by its professionalism, precision, and reliability, its brand integrity was being affected by inconsistent, off-brand email signatures with outdated legal disclaimers.

Hosted on Microsoft Azure, email signature management tools were introduced to the company to authenticate users and filter data via Azure AD. Running on Outlook and Office 365, all branding and legal disclaimer changes were centrally controlled, rolling out personalized employee information enterprise-wide without the need for manual updates from the IT department.

Within 48 hours the insurance company had its unique tenant running on the service with their bespoke email signature designs, SSO setup in place, and Azure Active Directory integration fully running.

50,000

outgoing emails per day

2 ASSISTED ASSEMBLY

Which touchpoints with clients and prospects might be overlooked at your company?

Email templates

Do you have standardized templates for your employees, with dynamic fields depending on their role, location and customer segment? This makes sending emails and building different cadences and nurturing workflows for prospects and customers consistent and easy.

Contracts, proposals & sales collateral

Do you have automated document workflows to optimize the process of creating, modifying and using documents? This increases workplace productivity and helps employees to stay on-brand at all times.

Email signatures

Is your company's email signatures on-brand, compliant, and up-to-date?

>>> Dig deeper into which touchpoints would need a more efficient and future proof system and process to ensure consistently on-brand employee communications. Research how different teams and departments are working with the brand and find the loopholes.

Today, there are many solutions available both on-premise or in the cloud that can help companies, like yours, to govern their brand and enable employees to easily find the right assets and templates.

As an example, TechRadar just listed the **best document management systems in 2019** and as you'll see, we're proud to see Templafy as #1.

3

VALIDATION

When having the responsibility of the overall marketing strategy and brand identity for a global firm, it can sometimes be quite complex to identify off-brand content and be aware of the errors.

With document automation, you can empower your employees to get all the details right and to stay on-brand.

- Distribute updates in documents, templates and brand assets
- Insert dynamically relevant personal and company information
- Check automatically
- Fill the time-wasting gaps

3 VALIDATION

Monitoring brand compliance across all company documents and communications needs to be a focus to ensure not only brand consistency is properly maintained, but also that the brand investment is utilized in every customer touchpoint.

But it's no fun being the brand police. It's much better to have the overview and trust that your brand is in safe hands.

Dynamic best practice templates and an easily accessible brand asset library will give employees a solid starting point to producing on-brand content.

However, for an additional "brand safety-net" to ensure your brand identity remains consistent across all channels, perhaps consider integrating built-in brand and compliance functionalities to your Microsoft products.

>>> This allows employees to easily validate documents from PowerPoint presentations to emails by identifying any off-brand content including fonts, company colors, and logos. At the click of a button it presents users with on-brand alternatives.

In essence, the more control you have over the execution and governance of your company's design and content used on Outlook and Office 365, the more power you have in **implementing a strong and successful brand image.** And in gaining the most out of this brand value.

When employees create Word documents, branding and legal disclaimers should be automatically applied to every document, depending on that employee's role and location, on the customer's region and the products they are purchasing.

If a logo is old or blurry, the address information a different location than where the employee works or where the client is located; this gives an unprofessional impression of your organization and dilutes the trust and goodwill for your brand. **However, these small – yet impactful – errors can be easily avoided.**

With document automation, you can empower your employees to get all the details right and to stay on-brand.

3 VALIDATION

Make your brand accessible to all employees, globally, by using Templafy to:

- **Distribute updates** in documents, templates and brand assets in real-time and directly to employees who need them, right where they work. Your chosen admin(s) control what gets updated and to whom. Never again do your employees need to ask, "where's the latest version?"
- **Insert dynamically** relevant personal and company information on templates and documents for employees working from multiple offices or under different brands.
- **Check automatically** that all documents, content and visual assets are consistent and up-to-date. Employees can re-use old documents and trust that the assets, disclaimers, addresses and other information are correct.
- **Fill the time-wasting gaps** in the document creation process by connecting all apps and tools. The job gets done faster and better, maximizing employee productivity every day.

The average employee produces multiple documents, emails & presentations every day, translating to **millions of documents** from large companies every year.

Without a reliable template and asset management system, there's **a risk of compliance, mistakes** and on missing out on the brand's full potential.

Templafy gives back the **control**, helping companies secure enterprise-wide brand and legal **compliance**. And to spread the **brand investment** through all employees.

Book a **30-minute free demo** with one of our Product Specialists and see how Templafy's SaaS platform boosts company productivity, ensures compliance and integrates directly with your current and future document management ecosystem.

Book a demo

Learn more at templafy.com