

THE
CREATIVE
AGENCY

RightFIT
CHECKLIST



*You've just
landed the
best free
business
advice out
there!*

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Why do you need this checklist?

1. To save you time

Quickly prioritize what you need to achieve your goals.

2. To help you find your ideal creative partner

Make the right choice for your company, avoiding costly reiterations and lost time.

3. To keep you from ending up with a half-baked brand

A great brand identity will open doors. You don't want to settle for less.

Shopping for a creative agency
doesn't have to be a **SHOT IN THE DARK!**

Here's how to use this checklist to find the right creative agency.

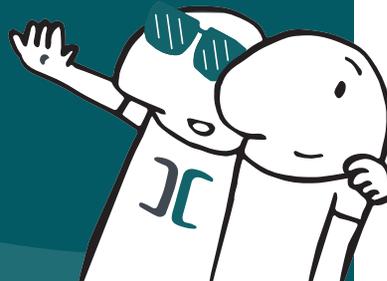
Now that you're ready to hire an agency, you want to make sure it's a team you will enjoy working with, get great value, and help you reach your goals.

We've collected a comprehensive list of questions for you. These areas impact the relationship and value you'll find in working with a creative agency.

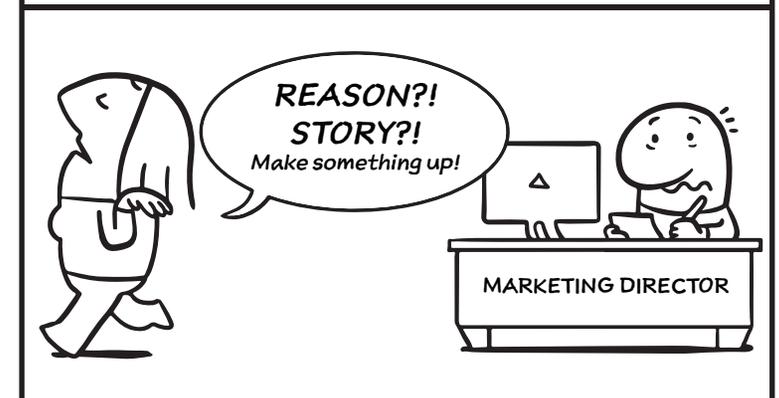
Use this checklist as a guide to:

- Highlight your priorities in a creative partner
- Outline relevant interview questions
- Craft your Request for Proposal

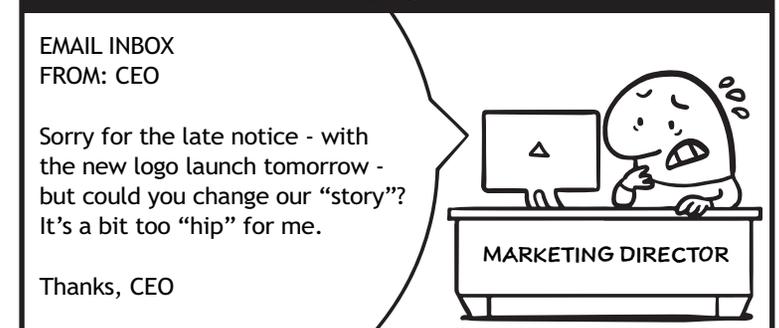
You're ready to find a right-fit creative team!



Leadership-Come-Lately



6 MONTHS LATER



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WHAT WE WANT

What does our company need?

Our current resources

What is the status of our in-house creative talent?

- We do not have an in-house creative team and rely on contractors.
- We have a small in-house creative team that needs support from specialists.
- We have a swamped marketing director who needs a versatile creative team.

Creative services we will need

What role will a creative agency play in our day-to-day business?

- Brand consultation: strategy, design, and messaging
- Creative design and campaigns
- Collaboration and execution of content creation
- Marketing and sales collateral: multi-channel marketing support: print, video, webinar, email marketing, etc.
- Talent recruitment campaigns
- Website, SEO, digital advertising
- Marketing automation: email newsletters, email nurture flows, etc.
- Marketing and sales CRM collaboration

MEETING PREP

What do I want to know about the agency we work with?

How will they approach our branding needs?

- Do our branding goals align with their area of specialization?
- How will they understand our challenges and goals?
- Will they help clarify our current brand and where we want to go?
- Will we be able to manage the intangible aspects of our brand more intentionally?

Where is our brand now? WHERE DO WE WANT TO BE?



We're old. We look outdated. We struggle to break from tradition and the way we've always looked.

We want to get our brand in the best shape ever!



We're weak. We're ailing & headed into triage. We're limping along with a mediocre brand.

We want a brand with marketplace muscle!



We're desperate. We're in crisis and calling in the specialists. Our brand is an obstacle to our growth.

We want a vital brand for sustainable growth!



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What is their approach to branding?

- What is their philosophy of branding?
- How do they define a brand strategy?
- What is their branding process?
- What is their theory of using colors and fonts?
- What role does branding play in marketing and sales?
- What is their process for developing brand messaging & tone?

What experience do they have with branding?

- Is branding just another item on their bulleted list of services?
- How do we like their portfolio on a scale of 1 to 10?
- Do they have experience developing brand architecture?
- Can they help us with company and product naming?
- Do they have experience with companies like ours? Is that important?
- Are their case studies relatable?

What would working together look like?

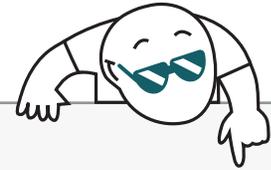
- Do their culture and values align with ours?
- Do we sense the right 'chemistry'? Would we like to work with them?
- Is their approach more collaborative, instructive, or a combination?
- Will they play well with our other vendors?

How will we communicate?

- Who will be the agency liaison with our team?
- What members of their team will actually be doing the creative work?
- Are communication channels flexible with what we use (in-person, remote, Slack, etc.)?
- At times our leadership team may be disconnected from the project or resistant to change: will their creative team work well with us?

Do they demonstrate capabilities and credibility?

- Do they have a good reputation, and can they provide client testimonials?
- Will there be any issues with confidentiality or conflicts of interest?
- Can they support our ongoing marketing and sales initiatives with a broad range of creative services?



Authentic Brands Thrive

A successful rebranding program is **more than a skin-deep face-lift.**

Rebranding is the opportunity for your company to **separate from the pack, attract the right talent, and bring ideal customers to your door.**

“Purpose fuels your brand. A clear purpose adds value to seemingly insignificant tasks. It’s the life behind everything you do.”

- Linda Kleist

COMPARING REBRANDING PROPOSALS

What can we expect in our rebranding project?

Brand Identity Creative Process

- What is involved in the discovery phase?
- How much time will be required of our team?
- Do they perform an audit of the existing website, marketing, and sales collateral?
- Are there surveys or questionnaires to get different perspectives of stakeholders? Leadership | Employees | Customers
- What is their approach to identifying key differentiators in our products and services?
- How do they define a “brand promise,” and will they help us create one?
- Will we discuss our ideal customers and develop customer personas?

Logo Concepts: What can we expect in a Logo Presentation?

- How many concepts can we expect to see?
- What logo orientations & font styles will be presented?
- Will the design correlate our brand attributes with the logo?
- Do the logo concepts anticipate all potential applications? (scalability & media)
- How many revisions will we have? Will there be additional fees?
- Is there a separate color presentation?
- Do they use the Pantone Color Bridge to select colors?

Brand Identity: What is covered?

- Our purpose, mission, and vision statements
- Core values and core value statements
- Brand promise
- Elevator pitch: who, what, why, and call to action
- Ideal customer personas
- Brand messaging and tone
- Logo symbol: the meaning behind our logo
- Market niche: what sets us apart in our industry
- What is the difference between the descriptor and slogan?
Are they incorporated in the final logo orientations?

“*There was a time when someone asked me what our brand was about and I didn't know how to answer.*

Now, I'm confidently sharing our unique brand mission and the value we bring to our customers.”

Darian Bobby, Owner,
Atlas Home Improvement



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Brand Deliverables: What do we get?

- What resources and tools will they provide to keep our brand aligned in all company initiatives?

Brand Standards and Style Guide: What is included?

- Logo orientations, with and without descriptor and slogan
- Digital logo files: PNG, JPEG, AI, EPS, PSD, TIF, PDF, DWG, BMP
- Font family
- Color palette
- Brand pattern
- Imagery style
- Social media profiles
- "Do's and don'ts" for vendors with applications for consistency
- Tutorial, training, and support for inhouse use and vendors
- Stationery system
 - Letterhead, envelopes, business cards (digital and print)
 - A2 note card & envelope
 - Internal communications: forms, labels, etc.
- Brand messaging and nomenclature
- Rebranding launch
 - Announcement of new brand identity
 - Planning internal and external launch

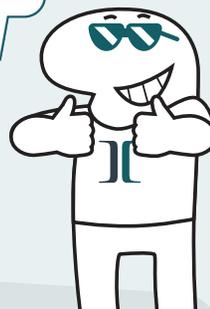
Timelines & Cost

- Are milestones clearly outlined?
- Are their fees competitive with others offering a similar level of experience and service?
- Can they provide flexible payment options to work with our budget?
- Are contracts per project or retainer? Long-term or month-by-month?

Rebranding Launch Support

- Can they assist us with managing the myriad of rebranding details?
- Can we have fun with this and enjoy the project?

CALL US!
We love LOVE
to talk
BRANDING!



Rebranding with a New Logo?

Avoid the pitfalls of an anemic launch.



THE BOOK: *Ready. Brand. Launch.*

What every marketing director wished their CEO knew about branding. Save hours of planning and avoid costly missteps in rebranding.

THE WORKBOOK

Be organized for a flawless rebranding launch.

- Checklists
- Timelines
- Budget worksheets

Create momentum, Capture attention, Celebrate success!

"Ready. Brand. Launch. will bring value to business owners and marketing directors who want to be intentional about creating a sustainable brand. As a sales and leadership consultant, I know that a great brand impacts all levels of a business for sales-generating growth."

Dr. Kathryn Baker, Co-Founder, OpenBookSelling.com

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