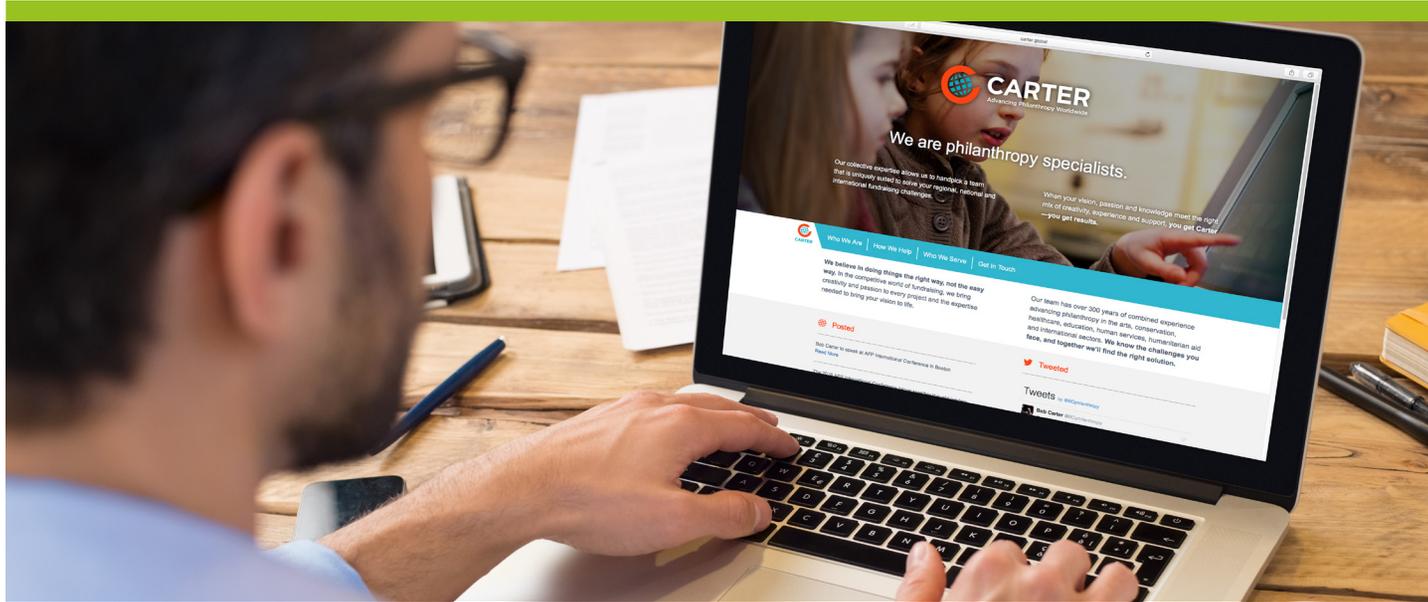


# Branding a next generation of leaders

A case study on how succession planning informed a new brand.



## Opportunity

Under the leadership of fundraising expert Bob Carter, Bob Carter Companies became a leading global consultancy in fundraising and philanthropic giving. In 2014, Mr. Carter was ready to transition the leadership of his enterprise on to his executive team and a new generation of consultants. A communications challenge quickly emerged: how do you move the company forward under new leadership, while still retaining the equity of the Carter name?

## Solution

ThoughtForm collaborated with Bob Carter Companies to imagine the next-generation of the company. This company would retain the vision and expertise of Mr. Carter, but also express a fresh face in the market with a new name and identity. Through this exploration, ThoughtForm helped Bob Carter Companies become Carter. With this new name, along with a new logo, kit of key messages, and website, Carter has begun to build new audiences and experience growth.

## How did we help?

- Analyzed the current state of the company's brand with a customer survey, brand audit, audience analysis, and competitor benchmarking study.
- Brought key stakeholders together for a thoughtful and comprehensive discussion of the future.
- Created new nomenclature, tagline, and supporting messages that carry through all communications.
- Created a new identity for the company that depicts a fresh energy and position in the marketplace.
- Delivered a simple-to-use identity guidelines manual that enables Carter staff to create on-brand communications.
- Culminated the new branding work into a website that expressed the company's people, values, and future direction.

**ThoughtForm did a great job of researching and embracing our profession. They helped us figure out how to position ourselves in our marketplace, and the result has been extraordinary growth.**

Steve Higgins  
President, Carter

## What did we do?



### **Conducted internal and market research to understand current brand perceptions.**

ThoughtForm wanted to test current perceptions of the Bob Carter Companies brand and service. ThoughtForm worked with the company's stakeholders to create and submit a survey to both external clients and internal consultants. The results of this survey—as well as a communications audit, audience analysis, and competitor benchmarking study—were shared at a Vision Catching® session with stakeholders. Through this collaborative discovery session, ThoughtForm gained the understanding it needed to craft a new identity and messaging for the company.



### **Developed new, fresh brand and identity to reflect the company's bright future.**

As a team of well-respected experts, Bob Carter Companies builds trusted relationships with global clients and leads with confidence. ThoughtForm wanted to include those qualities in the company's new brand structure and logo design.

ThoughtForm designed a variety of names and logos that represented the company's brand. Through a series of reviews, ThoughtForm helped Bob Carter Companies narrow a robust list of new names down to Carter. The new brand structure and name represent the man, Bob Carter, but also the qualities and integrity that his expertise and team have become synonymous with. The logo was designed as a stylized globe that is encircled by a capital C—a design that is simple, elegant, and direct. ThoughtForm captured this work in the form of a logo library and guidelines manual that details how to use the new identity in a variety of applications.



### **Designed and launched the new brand with a responsive and engaging website.**

ThoughtForm created a user-centered, responsive website to support the roll-out of the new Carter brand. ThoughtForm focused on creating robust functionality and intuitive navigation to support the goals of the site visitor and made the site compelling and engaging through branded visuals and messages. ThoughtForm also built the website with a CMS to ensure that Carter's staff could update and maintain it into the future.

## Who did we help?

### **Carter—renowned philanthropy fundraising specialists**

Founded in 2011 as Bob Carter Companies, Carter is a global philanthropy consulting firm with consultants located throughout the United States and Mexico.

The Carter team has over 300 years of combined experience advancing philanthropy in the arts, conservation, healthcare, education, human services, humanitarian aid, and international sectors.

# What did we create?

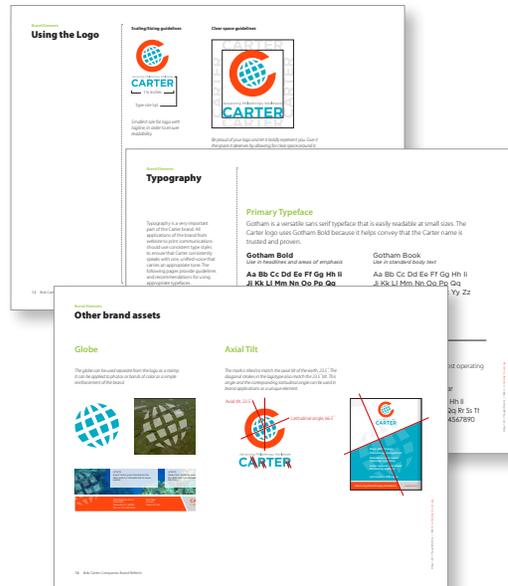
## Process documentation

ThoughtForm created a Design Innovation Guide, or DIG, to document the results of a Vision Catching® session and all of the research that went into it. Throughout the development of the project, ThoughtForm added documentation about name and tagline exploration, and then logo exploration. This process documentation helped Carter review their options and come to a consensus about name and logo decisions.



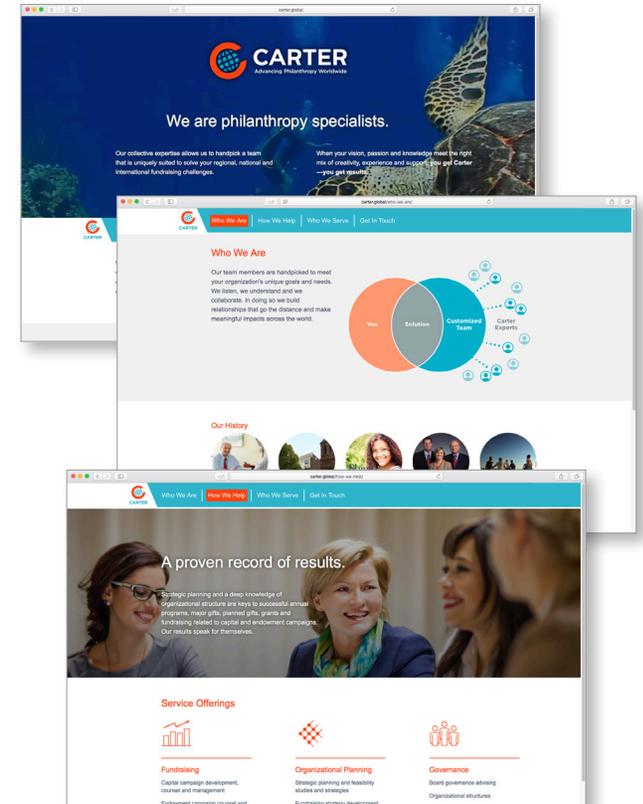
## Art library and guidelines

To help Carter implement its new identity, ThoughtForm created a comprehensive library of logo files to be used for a variety of applications, from print to digital. The accompanying guidelines manual details how to correctly reproduce the new corporate signature. It also describes typefaces, colors, and graphic elements that make up the new identity to ensure that the brand is maintained into the future.



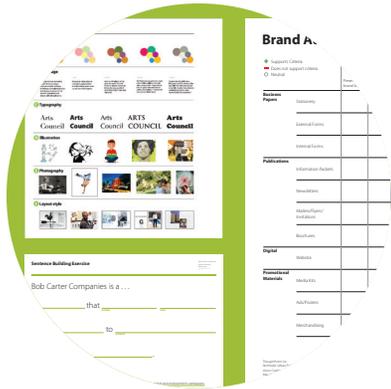
## Carter website

From wireframes to final design and development, ThoughtForm helped Carter launch its new website. The website features four easy-to-navigate sections: Who we are, How we help, Who we serve, and Get in touch. With the user in mind, ThoughtForm incorporated information graphics, iconography, and compelling photos to make the new website more visual and engaging.



# How did we do it?

For this project, the process was as valuable as the final product. The process ensured buy-in and consensus at every step.



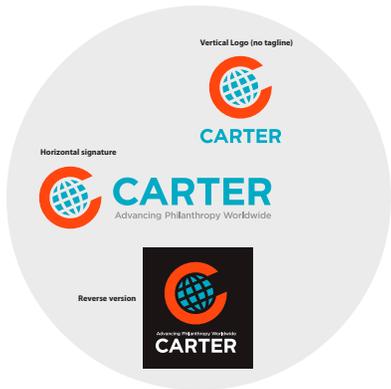
**Developed a series of research and understanding techniques** specially designed to capture the current state of the brand and explore new directions.



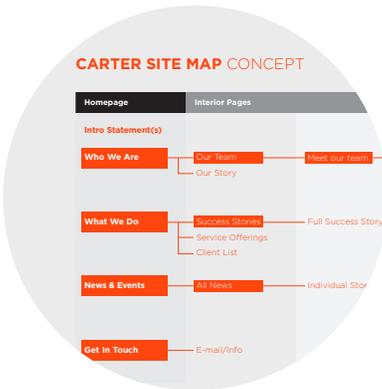
**Created a DIG (Design Innovation Guide)** that captured the results and outcomes of the Vision Catching® session, including clear next steps for moving forward.



**Ideated names and logos** to explore a wide range of directions for the new brand identity.



**Used a systems approach to build a logo library**, including descriptive file names, that gives Carter the ability to search for and select the appropriate file (color, file type) for any application.



**Used an agile development process** to design and build the new Carter website using WordPress with customized templates.

# ThoughtForm

ThoughtForm transforms ideas to connect people with actionable information. Working where strategy meets design, we help our clients turn fuzzy ideas, challenges, and opportunities into clear and meaningful messages and experiences. With ThoughtForm you can engage and inspire people, build their understanding, and enable them to take action.

ThoughtForm is a Pittsburgh-based design consultancy focused on visual communications. We work with leadership teams in organizations ranging from Fortune 100 companies to small nonprofits. Let us give your thoughts a visual form with the power to communicate.

To find out how our design solutions can help you contact Steve Frank at:

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To learn more, visit us at:

**[thoughtform.com](http://thoughtform.com)**

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