

## Building a Brand

### A Formulations interview featuring ThoughtForm's John Sotirakis

(The written version of this interview has been modestly altered to increase readability)

**Kevin Fernando:** Hello and welcome to Formulations. My name is Kevin Fernando and I am a marketing associate here at ThoughtForm. ThoughtForm is a communications design firm looking to bring beautiful clarity to complex ideas. Today we will be talking about brand architecture with designer and strategist John Sotirakis. Welcome to the set, John.

**John Sotirakis:** Kevin, great to be here. Good morning.

**KF:** Great! John is also a professor at Point Park University. He teaches a class called Branding and Identity Design. Did I get that right?

**JS:** That is absolutely correct.

**KF:** Today we've got the expert in the room to talk about branding. Let's get started!

#### How do you start to define a new brand?

**KF:** John when you first begin to start a brand, what are the first steps? Where do you suggest people begin?

**JS:** Good question, and not to be totally simplistic about it, but honestly it starts with a good conversation. To have that conversation, you have to have it with the right people. It's like having a dinner party, who do you invite to the party to have the kind of conversation that you want. Now at ThoughtForm, we do that in the form of a branding kick off session. For branding projects, think "Who are those key stakeholders that form that eclectic group of people that have that 360-degree view of the brand. From the CEO to the marketing director to the product people. Even HR and IT because brands are not just this external voice, it's a cultural act as well. So having the right people there to talk about it—it's like lifting the hood up on a car so that we could understand the parts: the mechanisms, the structure, the culture, the products. All of those things that create the infrastructure of that company, that is the foundation of brand building.

**KF:** That's interesting.

**JS:** And the good thing is that that informs brand architecture.

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**KF:** You mention bringing in roles like HR and IT—people who you might think are peripheral to the whole brand process. What kinds of roles would you give to those peripheral people.

**JS:** You know at this early point in the brand process, they're not peripheral. They are part of that culture. They impact that culture. If that brand is going to be successful, it has to be successful with audiences externally. But also, everyone in that corporation has to own that brand and evangelize it. That makes IT, HR, and everybody just as important at that point in the process. And it informs brand architecture. That enables us to start going to the marker board and begin to build what we are hearing into a skeleton, or structure. Whether it's products or services, or things that become part of that culture or company—we begin to map everything out. Having that brand architecture is a great start.

There's a couple of other things too, if you want me to tell you about those.

**KF:** Yeah! Tell me about them.

**JS:** To me, part of that great conversation during the kickoff meeting is words. We're thinking about language, words, and how you start to attach those to that brand structure. Language that supports brands is called nomenclature. That's a fancy term for words and language. I have to tell you a story about that from when we were working with the Carnegie Museum of Natural History. Kevin, what is natural history? What does that mean to you?

**KF:** That's a good question. You asked me this question when we were talking about branding yesterday and I couldn't give you a really good answer.

**JS:** That's okay! A lot of people have trouble with that. We could come up with two or three ideas in our own minds about what natural history is, but when we posed that question at our brainstorming session in the kickoff discussion, the people from the Natural History museum exploded that idea into 40 or 50 words. So all of a sudden, our understanding of that organization, what they do and what natural history is about, just blossomed. All of those words are our toolkit for building the language nomenclature around that brand. Now we have a much more sophisticated notion of what natural history is all about. So that's language.

**KF:** And what's next?

**JS:** The fun part! We start to add visuals. So it's like a layering thing. You've got that skeleton, we've added some language to the brand, now let's put color and typography and photos and

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illustrations to package that brand. To start to get it ready to put it out there as a brand. There are a million different kinds of tools to start to bring visuals to that exercise. And we'll touch upon all of these things in this kind of kickoff brand session.

**KF:** You mention that there are all these tools to start putting this together. Can you describe one or two?

**JS:** Sure! At one point you want to start hearing about their audiences. So we create what's called "audience personas." And you know, those could be either simple or in-depth. An organization never has just one audience. It usually has four or five different audience types. We try to really understand them. We want to see a picture of who they might be. We give them a name. We want to understand what their education is, what their background is, how they approach the brand.

Another great exercise is to create polarities to try to understand the personality of the brand. You can do present state but also where you want the brand to go. Polarities are word opposites. We create scales like "introverted to extroverted," "traditional to cutting edge." When you start to present continuums like that to clients, and ask where they want to place their brand on those continuums, it's fascinating. Everyone might have a different point of view. What we do is consolidate, bring it all together to create that one profile of the personality of the brand. And there are a million other techniques that we love to do. In a nutshell, that's how it goes down.

#### How do you redefine an existing brand

**KF:** All right John, question two. We talked a little bit about starting a brand from a blank canvass. How would that process change if you maybe have a brand but it needed some restructuring.

**JS:** Yeah totally different scenarios, and I love them both. If you have a brand new company, a startup company, it's sort of like you do have a blank canvass, and that's sort of exciting as a designer, but you can't be too open-ended about it either. When customers come to us and have a brand new company, we try to bring definition to where a brand should go. And even if it's a new company, they come with some criteria. They know where their brand should go, and we get that out of them and have that same conversation that I just described, and we're off and running.

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Restructuring an existing brand for an existing company is equally exciting. One of the things that we would first suggest before we go down this journey together is to survey their customers. Survey your audience. If you have been in business one year, or even five or ten years, you might think you know what customers are perceiving about your brand, but we have found that's often a poor assumption. We'll do a survey and ask the customers just simple things about brand recognition. We ask them "What is our logo?" And show them options A, B, C, and D, there are people who pick the wrong logo. Some don't know the logo at all. Then we ask what's our color palette? What is our messaging? What are the benefits that we provide? For a company that has already existed, and has had their brand out there, the insights we gain here are priceless. Tap into your audience. Then you'll see that you have a decision to make. Are we going to have to create some sort of evolution of your brand and respond to what you've heard? Or are you in need of an even bigger change?

**KF:** A revolution?

**JS:** A revolution! But it's tempered by what you learn from that survey. Either way you start at the middle. It's the journey that's the most exciting part of branding and the product at the end.

#### Navigating brand guidelines

**KF:** And for my last question, I hear you talking about this 25/75 rule when it comes to branding. Can you tell our audience a little bit about that?

**JS:** Yes, the 25/75 rule. That came up a few years ago when I heard from branding clients about their anxiety in adopting the new brand. They had anxiety in adopting the guidelines we had created for a new brand. People, no matter what the industry, want to be creative. They want to be inventive. To them, when they hear guidelines for a branding program, they think about a straightjacket. They think "those are the rules and we can't waiver from it." No, no, no. The best branding programs have flexibility built into them, but not 100% flexibility! Of course, you have to have some consistency. And honestly the biggest culprit when we audit brands, and we put everything up that they produced in the last year, is the lack of consistency. It looks like this department created that, and so on. So that 25% that I'm talking about is "Use these templates. Use the logo, the color palette, and the accepted fonts. If you do this, you are part of the brand family" and that is the goal. You have to do that.

But wait, there's this whole other 75% that you as a marketing manager, or product owner, whatever you do at your company, can be your invention or story. You did the 25%, now go

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have fun and be inventive with the 75% because that also brings value and quality to that brand. Some of it is templated, and some of it is also very personal from the people who work within those guidelines. It's a great balance. Maybe I'll make it 20/80. I'm sticking with 25/75 for the moment.

**KF:** So let me get this straight. If you are writing a brand guideline, you should really only write it to cover 25% of the content that's being produced? The other 75% will be coming from people's personalities and creative decisions.

**JS:** Yeah, the 25% is documented in the brand guidelines. Even the other 75% still has stuff that we can convey in brand guidelines that are thought starters and set them on the right path. A lot of the invention comes from "I want to tell my own story and pick my own photo." Well we might have some guidelines about the kind of photos that we suggest for your brand, but then have at it. Pick whichever photo you want. Even the stories that we tell, there's still language and style and conventions like that that make you part of the brand. We're not telling you what the story is. You can still write the story yourself. So there's still guidelines, but you can afford a lot of free reign.

**KF:** So you don't think that the free reign will lead to a muddiness?

**JS:** Anarchy?

**KF:** Yeah!

**JS:** No, I don't think so because here's the thing: Everyone keeps each other honest. One thing people should do with new brands is have an audit every year. Make a party of it, bring food, and look at the work that you've all created. And be positive and reinforcing but also say I'm not sure this feels like our brand. So it's sort of self-regulating, you know? If you see muddying happening, you correct it and work as a team.

**KF:** So if you do see muddying happening and want to correct it, how do you go about doing that?

**JS:** You know you just go back to the basics, and maybe by example. Bring in that third party consultant. But the internal team can do it for themselves as well. If there are two writers, and one writer wrote it sort of muddled and the other seems to have the right mix, have them

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work together and do it by example. Show how this can go to that and feel more clear and concise.

**KF:** Yeah, because if you have a muddy brand...

**JS:** Yeah, that's not good. You know in this day and age, there are so many companies and branding is so big, that the audience is fierce. They are looking for clarity, they are looking for immediacy, and if you lose that window of opportunity because your brand is muddled, you are not going to get to where you want to go.

I love when we worked with the APA (American Planning Association). They are a national organization of urban and city planners from Chicago. In our kickoff, there was a woman who threw her hand up. I think she was a writer. She said, "John, here's what I want. I want you to help the APA stop mumbling and start articulating our message." And it's kind of like the light bulb went off. She summed up what she felt is their problem. It was the lack of clarity in their messaging.

**KF:** So what did you do? How did you correct it for them?

**JS:** The journey of building the language and building the brand went on from there, and we had some examples and guidelines and good ways of telling APA stories. It was the fodder they needed to set them on the right path.

#### Signing off

**KF:** Okay, thank you for joining us, and thanks, John, for sharing all of your insights about branding with us today.

**JS:** When can we do it again, Kevin?

**KF:** Let's do it tomorrow!

**JS:** I'll be here!

**KF:** All right and we'll see you next month. If you miss us in the meantime, we have all sorts of blog posts, articles, white papers, and case studies on our website—[thoughtform.com](http://thoughtform.com). And subscribe to our YouTube channel to get this video series delivered to your inbox every month. Have a good month, everybody, and we'll see you later.