

A Keap guide to branding

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What is branding?

Though it has layers, branding, in the simplest terms, is a practice in which a business creates a name, logo and corporate identity that sets it apart from competitors.

On a deeper level, successful branding enables a company to distinguish and cement precisely what it offers to consumers in a competitive marketplace. In other words, a company's brand is essentially its DNA. Thus, a smart business works tirelessly to establish and maintain a brand that presents a compelling representation of what it is and what it stands for.

"A brand is the way a company, organization, or individual is perceived by those who experience it—your customers, partners and employees," said Luke Hayman, a partner at [Pentagram, the world's largest independently-owned design studio](#). "This perception comes from a combination of how you communicate visually and verbally, and most importantly, how you behave and the quality of your products or services."

Branding indeed shapes perceptions and transports consumers from basic awareness to full attachment. Per a recent study by Cohn & Wolfe, [63% of people surveyed across 12 global markets](#) said they would give their business to an authentic brand over a competitor that conceals who they are.

Apple. Coca-Cola. Nike.

These massive global corporations are much-heralded pros in the field of branding, and have written the proverbial book on how to create brand equity. Think about it. These companies essentially rely on the brands they've created and maintained throughout the years to do the selling for them, and consumers have chosen to faithfully purchase their products mostly because of their positive perception of the brands themselves. A trust has been developed over time. There's no risk for the consumers; they know exactly what they're going to get when they buy a pair of Nike shoes, a bottle of Coke, or an Apple laptop.

Here's a fun sidebar, if you will, to further demonstrate the power of good branding: Consider Tom Hanks. He's just an actor, sure, but he's also developed a brand of sorts. Many movie goers eagerly await his next film because they expect, based on his lengthy and impressive resume (not including *Joe vs. the Volcano*, of course), that it will be an entertaining movie and a solid investment of \$12 and two hours, give or take.

As with major corporations—and Hanks—branding can work just as well for a small business, especially in today's world of niche marketing. Some [experts insist that a brand is the most valuable asset that a business owns](#), and in order for a small business to stand out and thrive, it must establish and cultivate emotional connections with audiences through its branding.

“A brand strategy is a great thing to spend some time on,” Hayman advises small business owners. “You're already doing all this—communicating, producing and servicing—so you might as well step back and think about how you can do it deliberately. You can choose to ignore your brand, but you may be losing opportunities to other firms who behave and communicate better even though you may have a superior product or service.”

Branding is more than a business card

Think about a person who stands out at a crowded industry event, where attendees are strangers but wearing name tags. They shine in that setting because they have a dynamic personality that's affable and engaging, and their popularity grows as more and more event-goers discover them. The same principle applies to a brand. Companies want consumers to not only remember their name, but remember the "personality" of their business, and how it makes them feel good.

"A lot of small business owners think of branding simply as their logo, or maybe their logo and the colors that they choose to use," said Jake Johnson, Director of Creative and Content for Keap. "Those are important elements of a brand because they're signifiers and they set you apart from your competition from a visual perspective, but people don't always remember your logo or your colors very well, or associate them with your company. That stuff only goes so far. What people do remember are the interactions that they have with you, and the quality of their conversations they have with you, and the quality of the service you provide. Those are very important components of your brand, and I think small business owners often overlook that because they're so focused on logo, colors, fonts and those types of things. But they really should focus more on the quality of interaction and experience that they give to their customers. Logos and such should definitely come second as they brand."

In fact, many components are involved in developing a brand aside from picking a name and a logo. There's customer service, advertising, and creating a website and branding guide, to name just a few. If all are implemented, it's critical that they complement each other to better create one unique brand.

When developing a brand, experts advise entrepreneurs to be transparent. [According to labelinsight.com](https://www.labelinsight.com), 94% of consumers say they're likely to be loyal to a brand that offers complete transparency. Whether it's regarding a company's source materials, to being

up front about the total costs of a company's product or service, branding efforts that provide transparency to customers will translate into loyalty. In addition, [labelinsight.com](https://www.labelinsight.com) also stated almost three in four consumers (73%) say they're willing to pay more for a product that offers complete transparency in all attributes.

In addition to being transparent in branding, experts suggest the following:

- Be authentic
- Be distinctive
- Be relevant
- Be bold
- Be consistent

Here are a few other eye-popping stats on the importance of branding worth noting, per [zimmercommunications.com](https://www.zimmercommunications.com):

- 64% of consumers say that shared values are the main reason that they have a trusted relationship with a brand. Your brand message and image convey not just your products or services, but the values of your organization. Whether it's community, quality or sustainability, make sure that your values are clear to your target audience.
- 42% of consumers say they distrust brands. Whether it's poor customer service, a faulty product, or not delivering on expectations, many consumers are skeptical of what brands say they value or offer. Don't fall into this category, make sure you have a clear, concise brand message and that you deliver on everything that you promise.
- 65% of consumers say they have been disappointed by a brand's political stance. Taking on a cause or donating to a political campaign is often par for the course, but it's wise not to associate your brand with anything overtly political or controversial. You don't want to risk alienating a large portion of your customer base.

Benefits of branding

If a small business excels at branding, the benefits and ROI can be immediate and measurable:

Standing out

In some overgrown industries, it's challenging for a small business to stand out within the marketplace. With exceptional branding, a business can rise above the crowd as consumers come to know what the company is all about and relate to it, instead of just what it sells or does.

Think about the old-school Yellow Pages. Companies that posted an attractive ad within those enormous, jam-packed directories without question generally attracted more interest from consumers than those companies that simply listed their name and phone number among the hundreds of others under their industry heading.

Charging more

Branding can create a perceived value beyond the fair market value of an item. Many consumers are willing to pay more if they believe something will be of higher quality. The "you-get-what-you-pay-for-mentality" is still alive and well in 2020.

Selling more

Branding helps companies upsell because the expectation of quality has already been established and the consumer trusts the brand.

Free advertising

According to Hootsuite, [43% of internet users](#) use social media when researching things to buy, and 90% of brands use social media to increase brand awareness. And why wouldn't they? Branding via social media platforms such as Facebook, Twitter, Instagram and Pinterest gives companies access to millions of consumers without having to pay for ads.

Better employees

A fortune.com study revealed that [87 percent of employers](#) state that improving employee retention rates within the company is one of their top priorities.

Branding can play a valuable role in this endeavor.

“A thoughtfully executed brand has lots of unseen benefits, even within your company, such as increasing employee satisfaction, which leads to better retention and a better candidate pool when you’re hiring,” Hayman said.

Getting started with branding

So, as a savvy entrepreneur you've decided to make branding your small business a high priority. Congrats—it's a very smart move.

“Good branding will pay off,” Hayman said. “It's an investment and will help your company be competitive and get a higher return for your work.”

Branding requires time, analytical thinking and creativity. The process shouldn't be taken lightly and yet not too seriously. There should be an element of fun involved.

Recommended steps:

Research

Study the dynamics of your audiences and markets. Get a sense of how other companies in your industry are presenting themselves in terms of tone, personality, visual elements, etc. Note what you believe they're doing effectively and ineffectively. Learn from the mistakes you perceive. Are their branding efforts too stuffy? Not serious enough? Not tailored to the right audience?

Also, check in with your key employees to discover their points of view with regards to the nature and tone of your company's brand. Each employee not only has a unique perspective on the business, but most likely on how it should be presented to the public. Brainstorm ideas and move forward with the group's top concepts.

Create a brand story

Carefully review the products and services your business offers and then craft a brand story that explains what your company believes in, what pain points your products and services ease, and how you envision your brand evolving.

Ultimately, your brand story should clearly explain exactly why your company exists. When creating it, write it as a detail-heavy, historical account of your company. Feel free to include key facts about

your business and how it's evolved. Include fun anecdotes, and perhaps explain setbacks or challenges your business has overcome. Remember, a brand story explains why a business exists and how it makes the world a better place. At the same time, a brand story should be succinct. Once you've created your brand story, be open to refining it based on feedback.

Develop a consistent tone of voice

Build and reinforce the character of the business with consistent brand messaging. Also, avoid repeating key messages in the same manner. Instead, create key messages that complement each other and that build a coherent identity.

With messaging in mind, practice less is more. The technique of stamping a logo everywhere has become antiquated. The trend now is for a company to build an identity that creates buzz and intrigue about its brand that inspires consumers to investigate and discover the brand on their own.

Build assets

With the 3 Cs—clarity, consistency and commitment—of branding in mind, build the following brand assets:

- Logo
- Color palettes
- Typography
- Iconography
- Photography and graphics for marketing campaigns
- Style guide

Branding tips for small businesses

First of all, you don't need deep corporate pockets to build an effective branding strategy from scratch. Keep in mind, branding is different from marketing or advertising, and there are plenty of inexpensive techniques to create an identity for your business.

Here are some suggestions for do-it-yourself branders:

Network

Spread the word about your company and what it stands for with basic networking, which is free!

For example, when possible, attend relevant industry events and greet other attendees with a smile, a handshake and a business card. Invite them to visit your website and let them know you're active on social media (more later) and that you like to communicate there.

In addition, ask your employees to serve as ambassadors of your brand in their personal circles. Reward them for doing so accordingly, with a "Thank you."

Create content

Using your website as a hub, write blogs, produce videos, record podcasts and/or offer other content to build authority for your brand. Costs are minimal, especially if you or your employees are able to do the writing, the video/audio recording and editing, and/or serve as "the talent."

Be "social"

Social media platforms such as Facebook, Twitter, Instagram and Pinterest are cost-effective branding tools if used properly. The trick is to leverage them to build a business persona and a bond with consumers, and not for direct sales pitches. Instead of promoting products or services, simply provide news or content related to your

company, and perhaps even fun behind-the-scenes info about your business, or free industry tips.

Per buzzstream.com, 50% of consumers follow at least one brand on social media.

Use reviews

Closely monitor your brand on review sites such as Yelp, Google, etc., and publicly resolve any complaints or bad reviews that are posted by unhappy customers. Be apologetic, embrace the blame and then celebrate the resolution. Doing so will create credibility.

At the same time, ask satisfied customers to share how your product and/or service served them well in written, video or audio form, and then share their testimonials on your website in an ideal location.

Hire a pro

If you ultimately decide that you and your key employees are simply too busy to tackle branding, consider hiring an outside pro to help.

“If your business is just you and you’ve got a few customers, chances are you can handle branding by yourself,” Johnson said. “But companies evolve over time, and when that happens it can be helpful to bring in outside help because you can get a little myopic and get stuck in your ways. As your customer base expands, and your prospect base expands, you have the opportunity to talk to more people. Where a consultant is helpful is in the ability to do some interviews and come back to you with information such as, ‘Well, here’s how people perceive you relative to how you perceive yourself.’ Oftentimes, people aren’t going to be nearly as candid with you as the business owner as they are with a consultant you’ve hired to help you brand.”

Seek out corporate branding agencies that have a proven track record and vet them carefully. In [a blog for Keap.com](#), author Jeanette LeBlanc compiled a list of questions to consider before hiring a branding pro. Among them:

- Do they have a recent and deep portfolio that showcases examples from a variety of industries?
- Can they provide reviews and testimonials from successful campaigns?
- Are they enthusiastic and genuine about your company, services and brand visions?

Meanwhile, be certain to help them out by providing key information about your business:

- Describe your company in one sentence
- Tell them about your ideal client
- Tell them how you differ from competitors
- Tell them about other brands that inspire you or illicit your loyalty

“A great brand agency or consultant will use their own unique experience as well as a defined, repeatable process that both uncovers the client’s unique brand and flexes to accommodate the unique needs of each client,” said Mike Jones, the Creative Director & Partner at Resound Creative. “Don’t just look at the pretty pictures of past projects. Ask for case studies, ask about how they got from point A to point Z in branding another company, and ask what makes their process better than their competitors.”

When to update your brand

Greek philosopher Heraclitus once said, “The only thing that is constant is change.”

With that in mind, let’s ponder how often a business should update its brand. Unfortunately, there’s no set rule or formula. Some businesses update their branding regularly, while others not so much. Common sense should prevail on a brand-by-brand basis.

“Ideally, a business will never have to change their identity in a substantial way,” Hayman said. “It takes time to create an image of your company in a customer’s mind so a dramatic name or identity change means they have to learn who you are all over again. However, a brand can be tweaked and evolve as you grow. The goal is to keep a strong connection to your previous brand so people clearly understand you’ve just refreshed but you’re still the company they’re familiar with and have learned to trust. There are occasions when a brand does need a more radical change—when what you do, or your target audience changes. And perhaps the competitive set will disrupt your business, which means you need to change in response.”

Let’s consider some Major League Baseball teams as examples. The New York Yankees have utilized essentially the same brand including logo, team colors and home and away uniforms seemingly forever, and by doing so—and by winning 27 World Series championships—have built one of the more respected and admired franchises in the history of professional sports. Logic suggests Yankees fans would storm the team’s headquarters with torches and pitchforks if the team ever decided to change, or even subtly tinker with, its brand. “Baseball Blasphemy!” the headline in the New York Post would likely read that day.

On the other hand, the San Diego Padres alter their logo, team colors and uniforms with regularity—seven times in the past 30 years alone. Padres supporters, who have yet to experience a World Series title in the 50-year existence of the team, have been asked to come along for the ride each time. While some like and celebrate the frequent alterations to the brand, others argue that making constant changes is not a good look for a business.

A refresh vs. a rebrand

Experts liken a brand refresh to giving an old house a fresh coat of paint and liken a rebrand to tearing down the old house and building a new one from scratch.

A refresh might be necessary because:

- A company has grown
- A company's audience has changed
- A company isn't keeping up with the times

A refresh might include:

- Updating the company slogan and marketing materials
- Slightly revising the company logo
- Changing the company color scheme and/or type font

A rebrand is a much more complex and sophisticated undertaking.

As Keap.com senior copywriter Laura Dolan noted [in a recent blog](#), "It takes a lot of money and research to make a rebrand happen, this change doesn't occur overnight. If this is something your business decides to implement, it's a big commitment and will affect every aspect of your company and could take months before you're ready to emerge with a relaunch. Every department needs to be on the same page with reflecting how the new branding is going to look, ensuring consistency and stability."

A rebrand might be necessary because:

- A company has changed its leadership or direction
- A company wants to release new products or services
- A company's identity is clearly antiquated and/or stagnant

A rebrand might include:

- A new corporate identity, including name and logo
- Gearing the company toward a fresh market
- A redefining of company values and goals

Infusionsoft rebrands as Keap

In January of 2019, Keap completed a rebrand that took close to two years to execute, with help from Pentagram. The creation of two new products prompted the transformation after 17 years of operation as Infusionsoft.

Changing the name of a company with more than 200,000 customers worldwide was a major transition, but the company was ripe for such a move.

“Infusionsoft, as a product, is focused on a smaller segment of the small business market,” Johnson said. “It’s a very powerful, very flexible piece of software that, for the advanced customer, is an absolute home run. But we wanted to expand that market to millions of small businesses, so we realized that we needed simpler products (Keap Grow and Keap Pro) and experience, and Infusionsoft, as a name and as a brand, didn’t quite work for that larger segment. We needed something that was short and memorable and evocative of something and that felt modern and more consumer friendly.”



keap

Keap, spelled with an “a” instead of second “e,” is a clever play on “keep,” a word woven into Infusionsoft’s mindset and culture. Small business owners who use the Keap product line are encouraged by the customer relationship management software company to “keep going,” “keep serving,” and “keep growing.”

“The word Keap is a windfall,” Johnson said. “It’s a four-letter word that has a dot com domain to it, that reads phonetically like keep, and also is core to what we do as a product. Using our CRM, we help you keep all of your customer information in one place and we help you keep your customers.”

Lyft, the rideshare company, uses a similar tactic. Lyft will give you a lift, right?

“I think the rebrand has gone very well,” Johnson said. “Our partner community was behind it and was very enthusiastic about it. A lot of our customers have come around and really gotten used to it. It’s natural that you’re not going to always please everyone, but we’re seeing positive sentiment around the new brand as we monitor social media. We still have a lot of work to do in terms of extending it out, and a lot of work to do in terms of creating awareness for the Keap brand. That’s a testament to the Infusionsoft brand, which is still pretty well known.”

He added: “Keap is our signal to the world that we’re on a mission to simplify growth for millions of small businesses. Our new name is a nod to the grit and perseverance of small business owners.”

So, what were some of Keap’s obstacles during the rebrand?

“Well, anytime you rename a company, it’s very hard for a variety of reasons,” Johnson said. “First and foremost, it’s an emotionally charged decision. We had the company founders involved, the guys who named the company Infusionsoft, and so you’ve got a lot of well-intentioned and well-informed opinions at the table that you have to navigate, and you have to get alignment before moving forward. Also, there are very practical things that make the naming process challenging. You have to make sure that the name you pick is available from a trademark perspective, that there’s no legal challenges, and you have to make sure that there’s a dot com available. All of these details, and there are many more, go into it.”

Johnson said small business owners considering a rebrand should make sure they're financially prepared before committing to such an undertaking. Check and see if a refresh is the better alternative.

"There's always more to change than you first thought there was to change," Johnson added. "For a small business owner, that's probably going to be the biggest thing to navigate during a rebrand. Make sure you really do your homework and understand how much you're going to have to change and what the cost of that change is going to be, because there's a cost to make the brand and then there's a cost to roll out the brand."