A TALE OF TWO BRANDS

Adriana Biggs and Rebecca Martinez
LiftFund
www.LiftFund.com

Janet de Guehery and Lisa Junkerman
FLORIDA COMMUNITY LOAN FUND
www.fclf.org
A TALE OF TWO BRANDS

Janet de Guehery and Lisa Junkerman

FLORIDA COMMUNITY LOAN FUND
www.fclf.org
Origins of Branding

Early origins: craftsman, ancient pottery, tobacco

Dominance of mass marketed brands: regulations, personal selling, cereal deputs

Establishment of brand management standards: economic growth, brand manager position

Emergence of national manufacturer brands: transportation, packaging, advertising

Challenges to manufacturer brands: Great Depression, FTC, P&G – first brand management system

Branding becomes more pervasive: M&As, explosion of application of branding

Pre 1860

1860-1914

1915-1929

1930-1945

1946-1945

1986-Now

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MARKETING:
Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.

BRAND:
A brand is a name, term, sign, symbol, or design, or a combination of them, intended to identify the goods and services of one seller or group of sellers and to differentiate them from those of competition.
We believe that a strong brand, regardless of the market in which it operates, drives improved business performance. It does this through its ability to influence customer choice and engender loyalty; to attract, retain, and motivate talent; and to lower the cost of financing.
Top Global Brands
## 2015 Top Ten Global Brands*

<table>
<thead>
<tr>
<th>Brand Rank 2015</th>
<th>2014 Rank</th>
<th>2015 ($Million)</th>
<th>2014 ($Million)</th>
<th>2013 ($Million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Apple</td>
<td>1</td>
<td>170,276</td>
<td>118,863</td>
<td>98,316</td>
</tr>
<tr>
<td>2. Google</td>
<td>2</td>
<td>120,314</td>
<td>107,439</td>
<td>93,291</td>
</tr>
<tr>
<td>3. Coca Cola</td>
<td>3</td>
<td>78,423</td>
<td>81,563</td>
<td>79,213</td>
</tr>
<tr>
<td>4. Microsoft</td>
<td>5</td>
<td>67,670</td>
<td>61,154</td>
<td>59,546</td>
</tr>
<tr>
<td>5. IBM</td>
<td>4</td>
<td>65,095</td>
<td>72,244</td>
<td>78,808</td>
</tr>
<tr>
<td>6. Toyota</td>
<td>8</td>
<td>49,048</td>
<td>42,392</td>
<td>39,610</td>
</tr>
<tr>
<td>7. Samsung</td>
<td>7</td>
<td>45,297</td>
<td>45,462</td>
<td>41,992</td>
</tr>
<tr>
<td>8. GE</td>
<td>6</td>
<td>42,267</td>
<td>45,480</td>
<td>46,947</td>
</tr>
<tr>
<td>9. McDonalds</td>
<td>9</td>
<td>39,809</td>
<td>42,254</td>
<td>37,257</td>
</tr>
<tr>
<td>10. Amazon</td>
<td>15</td>
<td>37,212</td>
<td>29,478</td>
<td>23,620</td>
</tr>
</tbody>
</table>

*Interbrand’s Best Global Brands 2015*
Brand Categories - The Real World

- Cookie Cutter Brand
- Siloed Brand
- Me Too Brand
- Tired Brand
- Sacred Cow Brand
- One Off Brand
- Relevant Brand
Getting to Relevancy-The Real World

- Differentiation Difficult
- Decreasing Prospect Pool
- Changing Demographics
- Substitute Products Increasing
- Product Innovations
- Marketplace Uncertainty
- Competition and Confusion
- 3 Seconds to Prove Relevancy
A majority of consumers begin making a purchase decision in one channel but complete their transaction elsewhere.
Relationships that Build Relevancy

Marketing Channels

Sales
Customer, Media, Shareholder, Analyst Relations
Mobile Marketing
Offline Marketing (Advertising, Print, Direct Mail)
Online Marketing (Web, eCommerce, eContent, Video, SEO, SEM)
Employee/Internal Marketing
Social Media

Brand Awareness
Brand Image
Brand Response
Brand Relationships

Builds Brands

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What Makes a Top Global Brand?

**Internal Factors**
- Clarity
- Commitment
- Protection
- Responsiveness

**External Factors**
- Authenticity
- Relevance
- Differentiation
- Consistency
- Presence
- Understanding

Interbrand
Omni Channel Marketing Across All Channels Creates Brand Advocates

- Prospects experience brands, not individual channels within a brand.
- Marketing, PR, and branding functions leverage their view of the prospects in strategic and coordinated ways.
Brand Flux Model

Strengthen Position and Identity

© Williams, 2012
Best Practice Branding

Plan
- Establish Goals and Objectives
- Assess Current Brand Perceptions and Brand Equity
- Assess Macro and Micro Environments
- Assess Future Opportunities

Strategy
- Positioning, Branding, Naming Strategy

Integrate
- Secure the Right Expertise and Build Your Team
- Establish an Approval Process
- Review Concepts and Consider/Incorporate Feedback

Functional Collaboration

Perform
- Internal Branding/Socialization
- Execute External Rollout Campaign
- Brand Tracking, Measurement and Adjustment

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Marketing channels form a united front to support the organization’s mission and to drive brand equity.
The bottom line is that any brand—no matter how strong at one point in time—is vulnerable, and susceptible to poor brand management.

– Kevin Lane Keller, Tuck School of Business, Dartmouth College

Important of Brand Management

Leading Causes of Brand Death

- Budget Cuts
- Complacency
- Inconsistency
- Regime Changes
- Subtraction By Addition
- “I Like Purple”
- Too Many Cooks
- Skittishness

– American Marketing Association Conference
The Relevant Brand

1. Delivers on its promise and core competency
2. Customers value its offerings which they can’t get anywhere else
3. Practices aligned, integrated marketing across all channels
4. Consumers experience a brand (Omni-Channel Marketing) -- not separate channels within a brand
5. Functional areas leverage their individual perspectives in integrated and strategic ways
A Tale of Two Brands

LiftFund
DREAM IT. FUND IT.

Adriana Biggs and Rebecca Martinez, LiftFund
Accion Texas to LiftFund Rebranding Process

- **Summer 2014**: Rebranding discussion began
- **Fall 2014**: Agency selected, brand research conducted
- **Winter 2014**: Name selected, logo and brand standards created
- **January 2015**: Name and logo unveiled, corporate paperwork filed
- **Winter & Spring 2015**: Rebrand Rollout
Summer 2014 – Accion Texas

- Letters of Interest to creative agencies
- List multiple audiences, past and current borrowers, funders, stakeholders, partners, governmental agencies
- Assessed communication methods in place
- Conducted interviews with stakeholders
Fall 2014 – Accion Texas

- Selected agency
- Held focus groups
- Presented research

**Accion Texas Brand Positioning Pyramid**

WHAT WE STAND FOR
Helping people with limited access to capital have a chance to live their dreams.

WHAT WE OFFER
- We provide lenders ease of access to a traditionally unbankable market segment, while limiting the risk and resources needed to serve this population.
- We strengthen the ability of socially conscious individuals and community organizations to assist the underserved.

WHAT WE MAKE/DO
- We provide to borrowers who might not otherwise have access to funding equitable loans and financial education.
- We provide to all funders information on how and why to reach small business customers with poor or no credit and relationships with a growing market segment, and further support banks toward meeting CRA compliance.
- We provide additional support to socially conscious individuals and community organizations whose mission is to help people become financially stable.

TALKS TO THE HEART/SOUL
Helping people with limited access to capital have a chance to live their dreams.

TALKS TO HEAD
- We provide lenders ease of access to a traditionally unbankable market segment, while limiting the risk and resources needed to serve this population.
- We strengthen the ability of socially conscious individuals and community organizations to assist the underserved.

ACCION TEXAS BRAND POSITIONING PYRAMID
Fall 2014 – Accion Texas

Name Options
mpactFund
LiftFund
archway fund
LiftUpFunding
Fall 2014 – Accion Texas

- Name selected
- Selected logo and created brand standards
- Search with US PTO to verify availability of name, along with url, social media
- Contacted funders, donors, partners, stakeholders announcing intent to leave network
Logo Options
LiftFund

DREAM IT. FUND IT.

Launching Entrepreneurs for Over 20 Years

#OFNCONF
Winter 2014 – Accion Texas

- Next steps phased out and strategically planned
  - Updated and incorporated our new standards
  - Secured partnership with JPMorgan Chase
  - Planned press conferences
## Rebrand Checklist

**Recommended Phase 1 - To be completed by 1/9/15**

<table>
<thead>
<tr>
<th>Item</th>
<th>Owner</th>
<th>Estimated Time</th>
<th>Due Date</th>
<th>Done?</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Marketing</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Cards</td>
<td>Customer Service - Virginia</td>
<td>3 Weeks</td>
<td></td>
<td></td>
<td>List provided to Josh for setup, we will review before printing</td>
</tr>
<tr>
<td>Name tags/Lapel Pins</td>
<td>F &amp; H. &amp; Communications</td>
<td>3 Weeks</td>
<td></td>
<td></td>
<td>To be delivered 1/9/2015</td>
</tr>
<tr>
<td><strong>Collateral</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rack Cards (English)</td>
<td>Communications</td>
<td>3 Weeks</td>
<td></td>
<td></td>
<td>Review and update language, will work with Dan</td>
</tr>
<tr>
<td>Fact Sheet</td>
<td>Communications</td>
<td>3 Business Days</td>
<td></td>
<td></td>
<td>Phase 1 to reskin; Phase 2 create a Hybrid version incorporating the trifold listing industries</td>
</tr>
<tr>
<td>Presentation Folders (temporary for press conference)</td>
<td>Communications</td>
<td>2 Weeks</td>
<td></td>
<td></td>
<td>Needs to copy, only reskin</td>
</tr>
<tr>
<td><strong>5 Cs Document</strong></td>
<td>Communications</td>
<td>2 Weeks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Rebranding toolkit to include table tent with new logo/explanation of charge</strong></td>
<td>Communications</td>
<td>2 Weeks</td>
<td></td>
<td></td>
<td>Business cards, name tag, lape pin, polo shirt, stationary note card, laminated magazine piece - to be provided the day of All Hands on Deck event, brand book</td>
</tr>
<tr>
<td>Business Main Envelopes</td>
<td>Communications</td>
<td>2 Weeks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Letterhead</td>
<td>Communications</td>
<td>2 Weeks</td>
<td></td>
<td></td>
<td>Digital format and printed version with Accion info</td>
</tr>
<tr>
<td>Stationary (note cards) and Envelopes</td>
<td>Communications</td>
<td>2 Weeks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>News/idea for rollout</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Press Release and Media Advisory</td>
<td>Communications</td>
<td>1 Business Day</td>
<td></td>
<td></td>
<td>Change out logo</td>
</tr>
<tr>
<td>Templates</td>
<td>Communications</td>
<td>1 Week</td>
<td></td>
<td></td>
<td>New html version of template that will be universal</td>
</tr>
<tr>
<td>Email Signature</td>
<td>Communications</td>
<td>3 Business Days</td>
<td></td>
<td></td>
<td>Day/Cella to provide the two presentations currently being used. Communications to update with new brand</td>
</tr>
<tr>
<td>PowerPoint Templates (how to get a loan banker and blank template)</td>
<td>Communications</td>
<td>3 Business Days</td>
<td></td>
<td></td>
<td>Day/Cella to provide the two presentations currently being used. Communications to update with new brand</td>
</tr>
<tr>
<td>Communications Toolkit and Share Drive</td>
<td>Communications</td>
<td></td>
<td>Complete</td>
<td></td>
<td>Letterhead, logo, PowerPoint template, factsheet, email signature line, marketing pieces in a print file format</td>
</tr>
<tr>
<td>Action Brochure (past and future) - Tribune</td>
<td>Communications and Executive Staff</td>
<td>2 weeks</td>
<td>At printer</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Recommended Phase 2 - To be completed by 2/1/15</strong></td>
<td></td>
<td></td>
<td>At printer</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Website</strong></td>
<td>Communications - SWEB</td>
<td>4 to 5 Weeks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exterior/Interior Signage/Door Details (list of all signage at each location - Mission/Values Action poster)</td>
<td>Communications</td>
<td>4 Weeks</td>
<td></td>
<td></td>
<td>Exterior signage being replaced, will contact markets regarding the Brand Promise Interior piece</td>
</tr>
<tr>
<td>OurWrap</td>
<td>Adrienn</td>
<td>4 Weeks (2 Vehicles)</td>
<td></td>
<td></td>
<td>Wraps to be mailed to each market this week</td>
</tr>
<tr>
<td>Social Media Sites</td>
<td>Communications - SWEB</td>
<td>2 Weeks (Pending Site Approval)</td>
<td></td>
<td></td>
<td>Transfer over/Complete</td>
</tr>
<tr>
<td>Pull-Up Banners including Cafe Commerce</td>
<td>Communications - SWEB</td>
<td>3 Weeks</td>
<td></td>
<td></td>
<td>Printing and mailing to offices</td>
</tr>
<tr>
<td>Loan, Lending and SBA Documents</td>
<td>Lending</td>
<td>4 Weeks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Description</td>
<td>Department</td>
<td>Timeframe</td>
<td>Notes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------------------------------------</td>
<td>------------------</td>
<td>--------------------</td>
<td>------------------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rack Card Spanish</td>
<td>Communications</td>
<td>Approved</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Table Cloths</td>
<td>Virginia</td>
<td>3 Weeks</td>
<td>Already ordered, to be mailed directly to our offices</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Promo Items (Existing and New)</td>
<td>Virginia</td>
<td>4 Weeks 1 Business Day</td>
<td>Already ordered, to be mailed directly to our offices</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Company Directory</td>
<td>Virginia and Communications</td>
<td>Complete</td>
<td>Internal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Award/Templates</td>
<td>Communications</td>
<td>1 Week</td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update Voicemail Messaging</td>
<td>Virginia, Tom Sheub</td>
<td>1 Week</td>
<td>Internal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Existing Marketing Flyers/Buy down Programs</td>
<td>Communications</td>
<td>2 Weeks</td>
<td>Approved to be printed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Banker Flyer (all)</td>
<td>Communications</td>
<td>2 Weeks</td>
<td>Edits needed, will be combined so we only have 1 banker flyer and reskin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SBA 504 Brochure</td>
<td>Communications</td>
<td>2 Weeks</td>
<td>Needs to copy, only reskin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer Service Survey/ (Electronic)</td>
<td>Julie Werden</td>
<td>2 Weeks</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**PHASE 3 - TO BE COMPLETED BY 2/21/15**

<table>
<thead>
<tr>
<th>KIVA Brochure</th>
<th>Communications</th>
<th>2 Weeks</th>
<th>Front/back one pager - Spanish on one side, English on the other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>Communications</td>
<td></td>
<td>To be updated within 60 days, change out logo</td>
</tr>
<tr>
<td>Business and reprint for those with incorrect information/updated design</td>
<td>Communications/ Development</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Development collateral</td>
<td>Communications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Report</td>
<td>Communications</td>
<td></td>
<td>Requires a 4 weeks timeframe for design and review before submitting to printer</td>
</tr>
<tr>
<td>Café Commerce</td>
<td>Facilitated by COSA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**PHASE 4 - TO BE COMPLETED BY 3/15/15**

<table>
<thead>
<tr>
<th>Presentation Folders</th>
<th>Communications</th>
<th>2 Weeks</th>
<th>Josh</th>
</tr>
</thead>
<tbody>
<tr>
<td>MVMS Brochure</td>
<td>Communications and Ruth Esterling</td>
<td>2 Weeks</td>
<td>recreates into a 5 x 7 piece on a panel card</td>
</tr>
<tr>
<td>Development collateral</td>
<td>Communications/ Development</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reprint of additional business cards</td>
<td>Communications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FAQ Brochure</td>
<td>Communications</td>
<td>2 Weeks</td>
<td>Consider a video, Josh</td>
</tr>
</tbody>
</table>

#OFNCONF
January 2015

- Introduced name/logo to employees
- Held first of 16 press conferences
- Filed corporate paper work - name change submission to IRS for EIN
- Updated Grants.gov and notified all funders, donors and other stakeholders
## 2015 Opportunity Finance Network Conference

### Brand Rollout - Accion

**Event Name:** 401 East Crockett St. House<br>**Event Date and Time:** JUNE 28, 2015, 10:15 a.m.<br>**Purpose of Event:** To announce our name, logo and brand with a press conference<br>**Location:** Farmers Market - Market Square - San Antonio

<table>
<thead>
<tr>
<th>CATEGORY/ITEM</th>
<th>Owner</th>
<th>Questions/Notes</th>
<th>Due Date</th>
<th>DOne?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secure Farmer's Market through CDSA</td>
<td>Communications</td>
<td>Mark Jenkins - 800-8896</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Refreshment/event decorations</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attendees</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Invitation list to include:</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chambers of Commerce, State, County and City Officials (Mayor, State Representatives, Council Members), Board Members, Local Clients, Bank Partners and other stakeholders, AEO (Association for Enterprise Opportunity), EDA (Economic Development Administration), FDIC, ODF (Opportunity Finance Network), Federal Reserve, OPF (Organization for Enterprise Development), NALCAB (National Association for Latino Community Asset Builders)</td>
<td>Communications</td>
<td></td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Invite</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design invitation to include a printed and digital version</td>
<td>Communications</td>
<td></td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Invitation Master List</td>
<td>Communications</td>
<td></td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Name tags</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Event Equipment and Supplies</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pull-up Banner(s) and Table/Desk</td>
<td>Communications</td>
<td>words with logo on the bottom portion</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Two Posters with our logo/tagline to unveil - covering</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Laptop to receive donations and donation envelopes</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tables, chairs, podium and platform, backdrop/pipe &amp; drape</td>
<td>Communications</td>
<td>Farmers Market to provide chairs</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Audio-Visual (screen, speakers, laptop, etc.)</td>
<td>Communications</td>
<td>Symmetric Sound - Danny Fazio - 213-7281</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Communication</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marketing Materials and Collateral</td>
<td>Communications</td>
<td>Tifold/Pitchsheet/Press Materials</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Social Media</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agents and Programs</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Media Relations to include Press Release, Advisory and Press Kits and Media Interviews</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Run of show to include all speakers (clients/high profile guests) and Program</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Speaking Remarks</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Press</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Photograph/Videographer</td>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#OFNCONF
Collateral and Marketing

Tri-Fold Brochure

Social Media - Facebook

Website

Business Card – Front and Back

Pull-up Banners

Lapel Pin

Name Tag
Feb. – May 2015

- Rebrand rollout
- Planned, organized and held 15 outer market press conferences
- Focused on SEO efforts and community pages

September
- Created LiftFund Values
2015 OPPORTUNITY FINANCE NETWORK CONFERENCE

#OFNCONF
Next steps

Determine the impact of the rebrand

- Gauge brand integrity
- Quantify gain/loss of business
- Survey stakeholders – clients, partners, etc.
Adriana H. Biggs  
Chief Strategy Officer  
abiggs@liftfund.com  
(210) 507-4288

Rebecca L. Martinez  
VP of Communications  
rmartinez@liftfund.com  
(210) 201-8511
2015 OFN CONFERENCE
OPPORTUNITY.
MADE IN AMERICA.

A TALE OF TWO BRANDS

FLORIDA COMMUNITY LOAN FUND
www.fclf.org

#OFNCONF
REBRANDING PROCESS

1. assess perceptions
2. build a roadmap
3. clarify concept review process
4. rollout and introduction
5. measure, track, improve
1. ASSESS PERCEPTIONS

With Strategic Planning

Focus Groups & Surveys of Borrowers, Investors, Staff, Community Leaders

What are our brand’s strengths & attributes?

March-May 2013 in conjunction with strategic planning

After Strategic Planning

Does our name reflect those strengths & attributes? **YES**

Does our logo reflect those strengths & attributes? **NO**

January-May 2015 after completion of strategic planning
2. BUILD A ROADMAP

**Oct 2014**

Secure the right expertise & build your team.
We hired a local consultant (CMA) who helped us vet a logo designer and other local entrepreneurs.

**October 2014 to May 2015**

Set Meeting Schedules:
Marketing Staff and Consultant met weekly. Check-ins with CEO monthly. Presentations to staff and board twice.

**May 2015**

Determine Delivery Dates:

Kick-Off Date: In conjunction with Florida Community Loan Fund’s 20 Year Celebration.
3. CLARIFY CONCEPT REVIEW PROCESS

FOCUS GROUPS

STRENGTHS & ATTRIBUTES

Logo Designer

Marketing Staff & Consultant

CEO & Mgmt Team
4. ROLLOUT AND INTRODUCTION

Final 3 months prior to Launch Date

External Introduction
- Website
- Print materials
- Conference materials
- Social media
- Event planning
- Videos
- Advertising

Final 2 weeks prior to Launch Date

Internal Introduction
- Tell the story
- Make an emotional connection
- Style guide & approved fonts
- Business cards, letterhead, email signatures

Launch Date: May 12, 2015

Launch of New Brand Identity
- Staff kits – make it fun!
- Press release
- Email blast
- Website (1 week prior)
- Video
- Social media campaign & badges
2015 OPPORTUNITY FINANCE NETWORK CONFERENCE

FCLF LOGO 2014
(before rebranding)

FLORIDA COMMUNITY LOAN FUND
FLORIDA COMMUNITY LOAN FUND
## FCLF LOGO 2015 Roll-out Timeline Worksheet

### PRE-INTRODUCTION

<table>
<thead>
<tr>
<th>Task</th>
<th>Notes</th>
<th>Responsibility</th>
<th>Start &amp; Finish Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Color palette, EPS logo</td>
<td>PMS, RGB, and CMYK for all colors</td>
<td>from Eric</td>
<td>read</td>
</tr>
<tr>
<td>Website</td>
<td>update colors in global template</td>
<td>Janet &amp; Lisa work with Eric &amp; John K</td>
<td>From Eric by 2/27?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>in Pro/Doc 1/27</td>
<td>To John K by 1/29?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Eric &amp; John K starting 3/12</td>
<td>Draft by 3/13?</td>
</tr>
<tr>
<td>Fonts</td>
<td>For use in letterhead, memos, emails,</td>
<td>Eric will suggest Janet &amp; Lisa tweak as</td>
<td>Headline: Avenir (my</td>
</tr>
<tr>
<td></td>
<td>(an alternative for legal docs)</td>
<td>needed</td>
<td>fonts.com or fonts.co</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Main Officeredient 1/19</td>
<td></td>
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<tr>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Letterhead templates (and fox memo templates)</td>
<td>To have on S drive for all staff</td>
<td>Eric layout, Janet &amp; Lisa will</td>
<td></td>
</tr>
<tr>
<td></td>
<td>use</td>
<td>tweak/finalize if needed. Must be</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>printable at various offices from S.</td>
<td></td>
</tr>
<tr>
<td>Business cards</td>
<td>Simple to smartphone 3/23</td>
<td>Eric to suggest layout, we may tweak</td>
<td></td>
</tr>
<tr>
<td>Social media logos/avatars</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social media cover photos</td>
<td>+JA+ background +description of org</td>
<td>Janet can produce based on social</td>
<td></td>
</tr>
<tr>
<td></td>
<td>+20 years, send to website: JA+</td>
<td>media logos</td>
<td></td>
</tr>
<tr>
<td>Code 2</td>
<td>email signature software</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Janet will make changes, I will</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>purchase upgrade</td>
<td></td>
</tr>
<tr>
<td>Style Sheet / Brand Kit</td>
<td>Includes story, guidance on color,</td>
<td>Janet &amp; Lisa collaborate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>sizes, placement, etc.</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Have a printed version for all offices</td>
<td></td>
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<tr>
<td></td>
<td>so they can compare color to their</td>
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<tr>
<td></td>
<td>printer.</td>
<td></td>
<td></td>
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<tr>
<td>Magnetic nametags</td>
<td></td>
<td>Janet &amp; Custom Designs</td>
<td></td>
</tr>
<tr>
<td>Leather Folios</td>
<td>A request from Ed Tidberlake for</td>
<td>Janet &amp; Abbott</td>
<td>As soon as I get</td>
</tr>
<tr>
<td></td>
<td>board &amp; staff &amp; a few extras</td>
<td></td>
<td>eps from Eric, 2/??</td>
</tr>
</tbody>
</table>

### NOT URGENT, BUT WOULD BE NICE TO HAVE PRE-INTRODUCTION:

<table>
<thead>
<tr>
<th>Task</th>
<th>Notes</th>
<th>Responsibility</th>
<th>Start &amp; Finish Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Power point template</td>
<td>Create when needed, prior to</td>
<td>Janet design and get with Unbreakable</td>
<td></td>
</tr>
<tr>
<td></td>
<td>conference season</td>
<td>theme to install</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>if we can get Unbreakable</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>to install</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>(can I get Unbreakable to install</td>
<td></td>
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<td></td>
<td>it on all profiles &amp; remote profiles?)</td>
<td></td>
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<td></td>
<td></td>
<td>– will automatically load colors and</td>
<td></td>
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<td></td>
<td>fonts when a new word, excel, or email</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>is opened – can we include bullet</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>points?</td>
<td></td>
</tr>
</tbody>
</table>

### POST-INTRODUCTION

<table>
<thead>
<tr>
<th>Task</th>
<th>Notes</th>
<th>Responsibility</th>
<th>Start &amp; Finish Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fact sheets</td>
<td>For conference use &amp; template</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Impact Matrix</td>
<td>At end of fiscal year 5/2015</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pop-up banners</td>
<td>At end of fiscal year 5/2015</td>
<td></td>
<td></td>
</tr>
<tr>
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<td></td>
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</tr>
</tbody>
</table>
FCLF LOGO 2015
Staff Launch Kits
Website www.fclf.org before and after rebranding
5. MEASURE, TRACK, IMPROVE

- **Website**
  - Google Analytics
    - Overall sessions
    - New vs. returning visitors
    - Mobile vs. desktop
    - Top traffic sources

- **Social Media**
  - Analytics & Insights
    - Followers
    - Impressions
    - Engagement

- **Email News**
  - Statistics
    - Open rate
    - Click-through rate
    - Bounce / Unsubscribe
Our most recent quarter reached an all time high for website visits.

Impressions and Engagement increased during the quarter we introduced our new logo.

Open rates remain consistent, with “big news” months our highest percentage.
REBRANDING PROCESS

1. assess perceptions
2. build a roadmap
3. clarify concept review process
4. rollout and introduction
5. measure, track, improve
THANK YOU!

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