



Key Messages & Brand Strategy Service Grant

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Outline

- What is a Key Messages & Brand Strategy Service Grant?
- Why do a Key Messages & Brand Strategy Service Grant?
- What are the deliverables and what is considered in scope?
- What is not in scope for this Service Grant?
- What are the criteria to qualify for this Service Grant?
- Process
 - Key milestones
 - Pro Bono Consultant team
 - Project management and tools
 - Timeline

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What is a Key Messages & Brand Strategy Service Grant?

The Purpose:

- Help articulate brand strategy and tailor key messages to speak with a unified voice to your key stakeholders
- Review your existing name, logo, and communication materials
- Train your board members to be more effective champions of your organization

The Result:

- Stronger brand and positioning that better reflect your organization
- Consistent messaging and communications about your organization to clients, funders, volunteers, etc.
- Solid foundation for your future marketing materials and decisions

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Why do a Key Messages & Brand Strategy Service Grant?

Successful marketing and fundraising efforts hinge on an organization's ability to resonate with stakeholders. Unified and consistent messaging tailored to your organization is essential to effective communication.

What Challenges Might Your Organization Explore through this Grant?

- Who are our key target audiences?
- Who are we? Who do we serve?
- Why are we the best at what we do?
- What is our promise to funders, clients, and the community?
- How do current and potential donors view our organization?
- Does our name and visual identity (logo) accurately convey what our organization does?

* You may be able to further leverage the deliverables of a Key Messages & Brand Strategy grant with tactical follow-up Service Grants (e.g. website, brochure, annual report).

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Activities in Scope

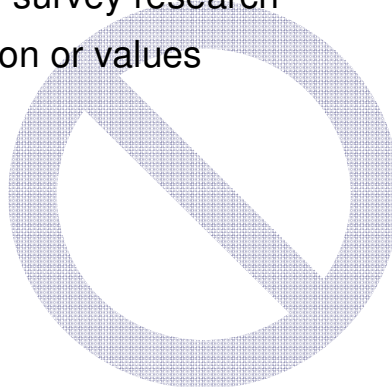
- **Interviews** (up to 10 interviews with a range of your key stakeholders)
- **Deliverables:**
 - ➔ **Brand Strategy:** A written document that explains your organization's unique niche in the market, 4 – 5 brand personality traits, and benefits that each of your core audience receives from the organization
 - ➔ **Competitive Audit:** Review and analysis of 3 – 10 organizations' messaging that compete with you for funding and/or clients
 - ➔ **Recommendation** regarding whether your organization should keep or change your name and/or visual identity
 - ➔ **Key Messages:** 250, 100, and 50-word organizational descriptions, an elevator pitch, a PR boiler plate, and, based on the benefits, tailored messages by audience
 - ➔ **Requirements Brief for Name and Visual Identity:** Outline of creative direction and goals for new name and visual identity based on brand strategy (as needed)
 - ➔ **Marketing & Communications Audit:** A chart outlining your current marketing and communications materials, with a review of which items need to be updated based on the new key messages
 - ➔ **Board Training:** Pro Bono Consultant team will train your Board on how to use the key messages in their verbal solicitations

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Activities that are not in scope

- Creating a marketing or communications plan
- Focus group research or survey research
- Changes to mission, vision or values
- Taglines
- Testing of messages



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Grant Criteria

We recommend you apply if your organization has:

- An Executive Director and Board of Directors who are strongly committed to this project
- Staff who can invest the necessary time to make the project succeed:
 - Executive Director: 10 to 15 hours total (1 – 2 hours each week)
 - Day-to-Day Contact: 3 to 5 hours each week
 - Board of Directors Representative: 5 to 10 hours total
 - All Board Members: 1 to 2 hours total
- A current and complete Strategic Plan

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The Process



* Please note that while the Pro Bono Consultant team completes most of the work, the nonprofit also has tasks and deliverables at each stage.

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The Key Messages & Brand Strategy Team

- Account Director
- Project Manager
- Brand Strategist
- Marketing Manager
- Copywriter

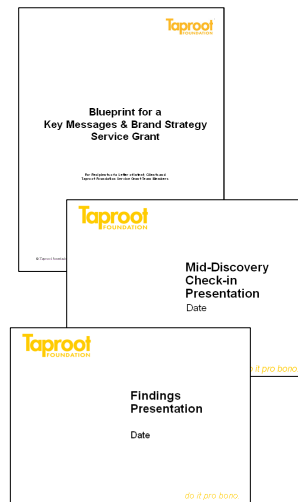
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Program Management and Tools

Your organization will be equipped with the following resources for the Key Messages & Brand Strategy Service Grant:

- Leadership from Account Director
- Oversight from Project Manager
- Pro Bono Consultant team with Taproot tools that can be shared with you as needed:
 - Key Messages & Brand Strategy blueprint
 - PowerPoint templates for: Mid-Discovery Presentation and Findings Presentation
 - Helpful articles and links



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Ideal Timeline*

Stage	Approximate Timing
Letter of Intent (LOI) Sent	
Account Director Assigned / Site Visit	1 month after LOI sent
Staffed	2 months after LOI sent
Kick Off Completed	3 months after LOI sent
Discovery Completed	4 – 5 months after LOI sent
Findings and Brand Strategy Completed	5 months after LOI sent
Audit Complete / Key Messages Approved / Req. Brief Presented (if applicable)	6 months after LOI sent
Final Presentation	7 months after LOI sent
Board Training Completed	7 – 8 months after LOI sent
Project Closed	8 – 9 months after LOI sent

*Ultimately, depends on you and your team

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