

# From Design to Delivery: Five Steps to a Successful Rebranding Campaign



Rebranding your firm is a complicated and involved process that requires management of many moving parts. From the moment the rebranding decision is made, the marketing department quickly finds itself facing a multitude of decisions such as the development of a new name, logo, design plan, slogan and more. At the same time, plans need to be made to launch the new identity in a multi-faceted campaign that results in a positive response from customers, business associates and employees.

For any firm, regardless of size, a rebranding campaign is a complex process that requires the successful execution of hundreds of steps in a tightly coordinated timeline. But, with the right partner, you can achieve success and deliver stellar results. The keys to success are project planning and management, open communication and creating successful partnerships with vendors and internal resources.

## Key components of a rebranding campaign

When you consider every single aspect of a rebranding campaign, it can quickly become overwhelming. One way to prevent this is to build your plan based on five key milestones:

- 1 Determine design requirements and review vendors
- 2 Conduct a collateral audit of existing materials
- 3 Complete the pre-launch checklist
- 4 Launch the new brand
- 5 Conduct the post-launch post-mortem

Embedded in each of these steps are a myriad of sub-tasks that must all take place. Planning, organization and partnering with great outside resources will help make the job easier.

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### 1 Determine design requirements and review vendors

Whenever you are creating a new brand, it is a good idea to work with a design firm or ad agency to make sure that the best interests of the firm are protected during the change. For small projects involving simple address or layout changes, it may make sense to work with a print vendor who has experienced designers on staff. But for large scale changes, it is best to hire a design firm or ad agency.

The question is – what is the best way to review and select a firm? A quick search on the Internet illustrates that you have a choice of thousands of firms. One way to narrow the field is to seek recommendations from peers who have managed a rebranding project. They can provide valuable experience-based advice. Print vendors can also provide recommendations; they routinely work with designers on a wide range of projects and can provide firsthand insights into their working style and the quality of their work.

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As you narrow the list of possible vendors, focus on those with experience in creating memorable brands. It's a good idea to hire someone with experience in your industry, however, a talented design team is able to transcend industries and apply a fresh approach to your business. Focus on each firm's creativity and approach to design. Look for indicators of a match to your philosophy, culture and thinking.

Once you've selected a firm, it is important to establish a clear understanding of the design firm's role in the project, for both your internal staff and the firm.

- **Establish a clear set of goals.** You want to be sure that everyone is working toward the same expected outcome, so clearly define your goals and share them with the entire team. Set measurable results and communicate them. For example, if you want the design firm to handle the printing directly with your vendor, spell it out. If you'd like your print vendor to communicate with your regional offices to coordinate details, state it in the goals. Clarifying expectations up front will eliminate confusion or assumptions and create a smooth partnership.
- **Treat your design firm as a member of your marketing or support team.** Don't simply view the firm as a service provider – invite them to participate in the project at the same level you expect from your staff. To achieve the best results, the design team will need to become very familiar with your firm's business and culture. Encourage the process. You want them to be as invested in the experience and outcome as you are.
- **Challenge commonly held beliefs and ideas.** You want the best possible results for your firm, so encourage the team to think outside the box and challenge sacred cows. Sometimes this can feel like an awkward process, but it doesn't have to be if you lay out the ground rules for brainstorming at the outset. Let the

ideas flow. You'll know when the creative process has gone too far and it is time to scale back.

- **Look for a firm that can add value through key services or strategic thinking that fits your needs.** For example, if you plan to do a lot of advertising, you may need to work with a design firm that has a media planning group. Or, if your firm has limited resources, you may choose a design firm who can also help with planning and executing strategic development programs.

It is also important that the design firm and print vendor have an open line of communication so the printer is actively involved and serving as a print resource/expert. The print vendor can suggest ways to maximize cost- and time-efficiency on press and estimate production times in advance to ensure the project is delivered on time and within budget. A print vendor can also provide you with finished product proofs for sign off before full scale production begins.

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## **2 Conduct a collateral audit of existing materials**

The next step is to perform a marketing collateral audit. This process can be as simple as laying out samples on the conference room table and gathering feedback from employees. Invite any and all comments, suggestions and ideas. Ultimately, you'll find out which pieces are used most frequently, occasionally or not at all – and why.

The audit process can also help you pare your collateral down to a set of core products and reset inventory levels to match actual usage – resulting in lower print costs. It is also a perfect time to review your ordering procedures and determine if any potential cost savings can be gained by consolidating the ordering process for all offices.

Finally, the audit is a great opportunity to ask employees for suggestions for new items that will add value to the partners and staff.

At the end of the audit, you should have a list of all the materials that will be affected by the rebranding launch. The first step is to make the master list and determine what must be produced and when. It may be necessary to roll out items in phases, depending on your deadline.

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### 3 Complete the pre-launch checklist

The execution phase starts with the completion of a pre-launch checklist, where the marketing team, design firm and additional vendors are working closely to create the brand and gain approval from internal project stakeholders. Essential activities include:

- **Project scope creation and approval.** Pre-launch begins with the basic premise that all your stakeholders, managing directors and the board have agreed to the rebranding project. The project should be outlined in a project charter that defines the goals, milestones and metrics to measure success. At this point, you'll likely have a general timeline. It will become more refined as the project develops.
- **Team and vendor appointments.** The next step is to name a project champion and project manager. The champion will be a high-level mentor (for example, a key partner in the firm who supports the rebrand) who, along with the project manager, reports on progress to the stakeholders. The champion does not work "in the trenches" but reviews project reports regularly, keeps track of milestones and metrics, and makes sure the project stays on track.

The project manager's role is to be the day-to-day leader of the project for a specific duration. This person oversees activity and communicates direction to the team,

but for the most part, is not a “doer.” This is a pivotal role. It is extremely important to appoint a project manager with the skill set and the bandwidth to effectively manage the project. The ideal candidate should have previous project management experience and a broad understanding of the inner workings of the firm. They should be detail-oriented, reactive to deadlines but not easily flustered and have great people skills.

The project manager, champion and stakeholders will name the balance of the team members based on the project requirements. Project teams vary, but it is not unusual to have members from each area of the firm including administration, finance, IT and client services. This is important to make sure that crucial details are covered and to ensure company-wide buy in to the process.

At this point, you can introduce the project team to the design firm and other vendors, and establish how formal communication will be conducted so there is no confusion or miscommunication. For example, the project manager may request daily update reports from each team member that can be distilled to a one-page daily update to key stakeholders.

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- **Market review.** The design firm and your marketing department will conduct a market review to determine your firm’s current brand position among competitors – and what you want it to be. This forms the basis for the new design process. For example, if you determine that your brand should showcase innovation and environmental action, your new design may push the boundaries of creativity typically found in the law firm market. It may also require an environmental element,

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such as using a minimum of 30% post-consumer waste paper in your print collateral.

- **Budget, resources and timeline development.** Once you've chosen vendors and determined what you want to achieve with the new brand, you can further refine and finalize the budget and timeline based on input from your vendors.

A word of caution – it is easy to underestimate, not overestimate the time required to accomplish project tasks, particularly in the approval process. For example, the task of proofreading and approving the firm's new business cards may seem like a project that can be turned around in a day. But when hundreds of employees and multiple locations are involved, the task will more likely take days, not hours to complete.

Also, for many law firms, the rebranding campaign is often one of many projects, making the allocation of resources tough. If you are in this position, ask your vendors what support services they can provide. The design firms may be able to assist with aspects such as minor project management, copywriting and production of e-campaigns to take some of the pressure off internal resources. Some print vendors offer a full array of production and fulfillment services to augment your staff. They may also provide project staff of their own to support your team for the life of the project.

- **Design concept review.** Your design firm or ad agency should help you develop a plan for the process of conceiving, presenting, refining and choosing final designs. Typically the design firm will take everything learned in the market review and present the project team with several rough concepts of a new look and voice. Keep in mind that your brand "speaks" for your firm and so understanding the voice of your new brand is important. For example, a firm with a strong technology offering may have a brand that includes highly innovative design elements.

It is not unusual to go through more than one design review phase – in fact, it is expected. The first round may include very loose or rough concepts to gauge the general direction of the brand. From a review of many concepts at once, you and the design firm will be able to narrow down the direction of the brand.

During subsequent design reviews, the brand should become more and more refined until you have a few “finished” concepts to share with your stakeholders.

- **Stakeholder presentation and approval.** The design firm or ad agency will present or prepare you to present the brand concepts to your stakeholders. Depending on the size of your firm and the nature of the rebranding, you may want your print vendor to provide finished proofs of products, so that decision makers can touch and feel to fully grasp the new brand identity. Providing proofs for the rebranding process is a common practice that your vendor should welcome.

Again, it is not uncommon to have more than one approval round. Your stakeholders may decide that they approve some parts of a brand concept, but that others need more refinement, resulting in more approval rounds. This is not unusual.

- **Gathering variable information: names and addresses.** The final step in the pre-launch is to gather all the information – names, titles, phone numbers and e-mail addresses – that will appear on the new stationery and business cards. This may sound easy, but many law firms find it to be more difficult and time-consuming than they ever imagined.

Your information technology and/or human resources department may be able to streamline the process by collecting information from an employee database. Even so, it is still recommended that you double check the content with each individual.

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If your resources are stretched, ask your vendors how they can help. In some cases, your print vendor may be able to provide templates and resources and also help you set it up so that future edits are easily managed.

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## 4 Launch

Now, we're moving on to execution. This is the stage where all the hard work and preparation finally start to pay off with actual, finished product. This includes pieces like a new advertising campaign, marketing collateral, stationery, signage and introduction materials. The execution phase can be a stressful time, when every problem you never thought of during your risk assessment crops up. This is where your team will be tested. You will encounter problems, but the project planning and communications will see you through to success. The day the new brand is launched and everyone is receiving new product will be a stressful, yet exciting day.

Through the glow of a job well done, it's important to remember that the job is not complete. Execution of the new brand for "Day 1" was your main goal, however, now you need to focus on creating the process for the new program to run itself and maybe pass off responsibility to an administrative team.

Your design team will most likely be involved during the post-launch phase to resolve issues and produce new materials that came about during the launch. They should be preparing to transition out of the project in the near future, and at this point be creating all the documentation your team will need to manage the brand going forward. Documents like a brand identity manual, if not already created, should be done at this stage.

# 5

## Post-project review

The last step is often the easiest step to overlook – the post-project review. Plan on conducting a post-mortem review with all parties involved in order to discuss what went right and what went wrong during the project. This is a “lessons learned” event that is not intended to point blame, but to communicate clearly on what was successful and what processes need work.

The post-project review and its subsequent actions are essential to create a smooth working environment for future projects. Also, if a new team will administer the brand program moving forward, the post-mortem is a good chance to get them “up to speed” on the initial goals and program development.

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## Summary

At the end of the rebranding process, you will be exhausted! But you will also have the ads, stationery, promotional items and accolades that are the tangible result of a job well done. The keys to success are project planning and management, open communication and creating successful partnerships with designers, vendors and internal resources.

## About Merrill Corporation

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