MANAGING YOUR BRAND IN-HOUSE

Blue Marble Creative
Lisa Mullis

@BlueMarbleC

agenda

Guiding documentation

Inventory and storage of brand assets

Creating brand assets

Working with templates

Internal communications and workflow

Skills

Brand guardianship

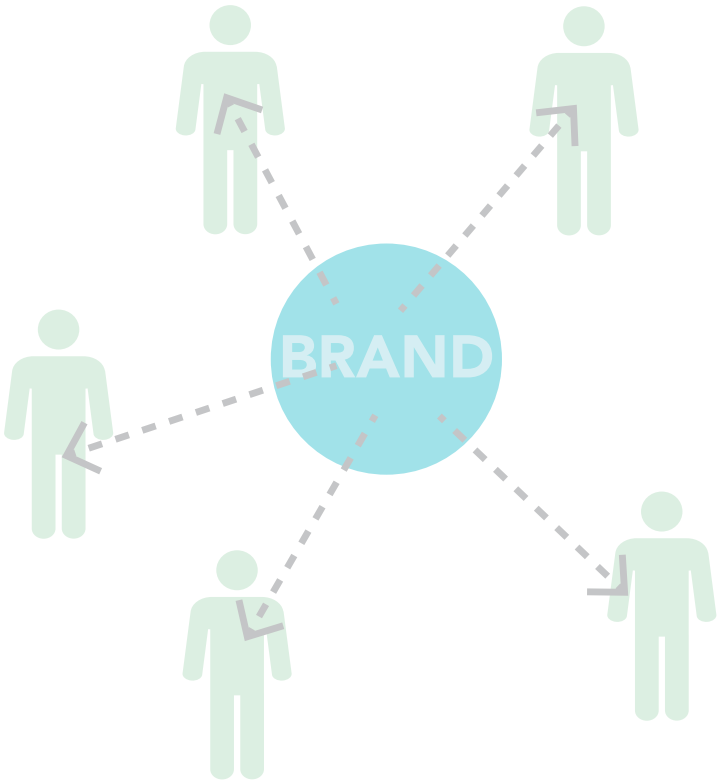
Q&A

why it matters

what is brand?

what is brand?

what is brand?



principles of good brand management

Direction

guidance, orientation and clarity

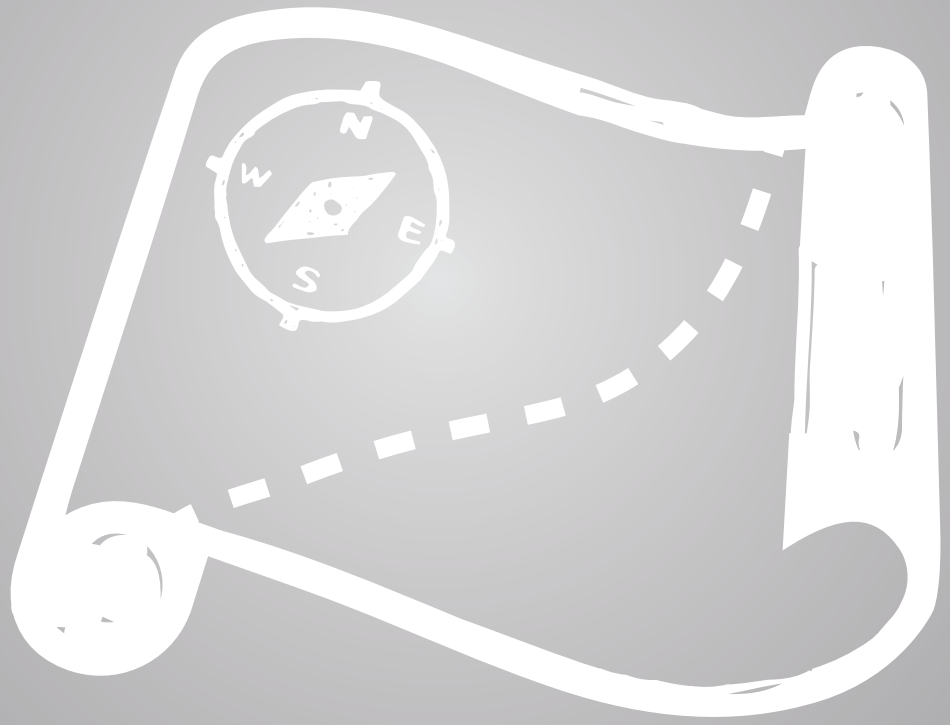
Constraint

enables creativity

Organization

having a system, having a process

guiding documentation



style guides

a collection of agreed-upon brand decisions

types:

visual style guide

messaging or editorial style guide

social media guide

brand guide = visual + verbal + situational

visual style guide

basics:

- logo usage
- color palette
- typography and fonts

can also include:

- image use
- stationery design
- templates
- visual examples

style guides address print and digital applications

visual style guides

Maslow Project: Logo Guide 2015

large view

typical size

in reverse *(for dark backgrounds)*

triangle only

logo within hand drawn square

grey/black boxes are for visualization only (not a part of the logo)

Maslow Project: Colors and Fonts 2015

Colors

PRIMARY BRAND COLORS

white	dark slate	dark blue	light blue
	RGB 59/58/60 CMYK 0/0/0/92 HEX #3B3A3C	RGB 65/143/222 CMYK 70/36/0/0 HEX #418fde	RGB 87/188/235 CMYK 58/7/0/0 HEX #57BCEB

Maslow blue = dark blue Pantone Coated 279 C (other colors do not have PMS swatch identified)

light blue is for use alongside dark blue when needed, or as secondary color (not an alternative)

SECONDARY COLORS

sunshine	ponderosa	strawberry ice	tomato	lichen	forest fog
RGB 245/193/99 CMYK 3/25/71/0 HEX #F5C163	RGB 217/139/69 CMYK 2/46/78/11 HEX #D98B45	RGB 246/159/160 CMYK 0/46/25/0 HEX #F69FAO	RGB 216/91/41 CMYK 11/78/98/1 HEX #D85B29	RGB 135/203/156 CMYK 48/0/50/0 HEX #87CB9C	RGB 58/155/138 CMYK 75/19/52/2 HEX #3A9B8A

Fonts

Headlines look good in Lato Bold

SOMETIMES UPPERCASE

Lato regular can work well for body copy and is recommended for client-facing materials.

ITC Stone Serif Medium is a friendly, modern, and approachable serif for body copy. It is recommended for use with Lato headings on donor-facing materials.

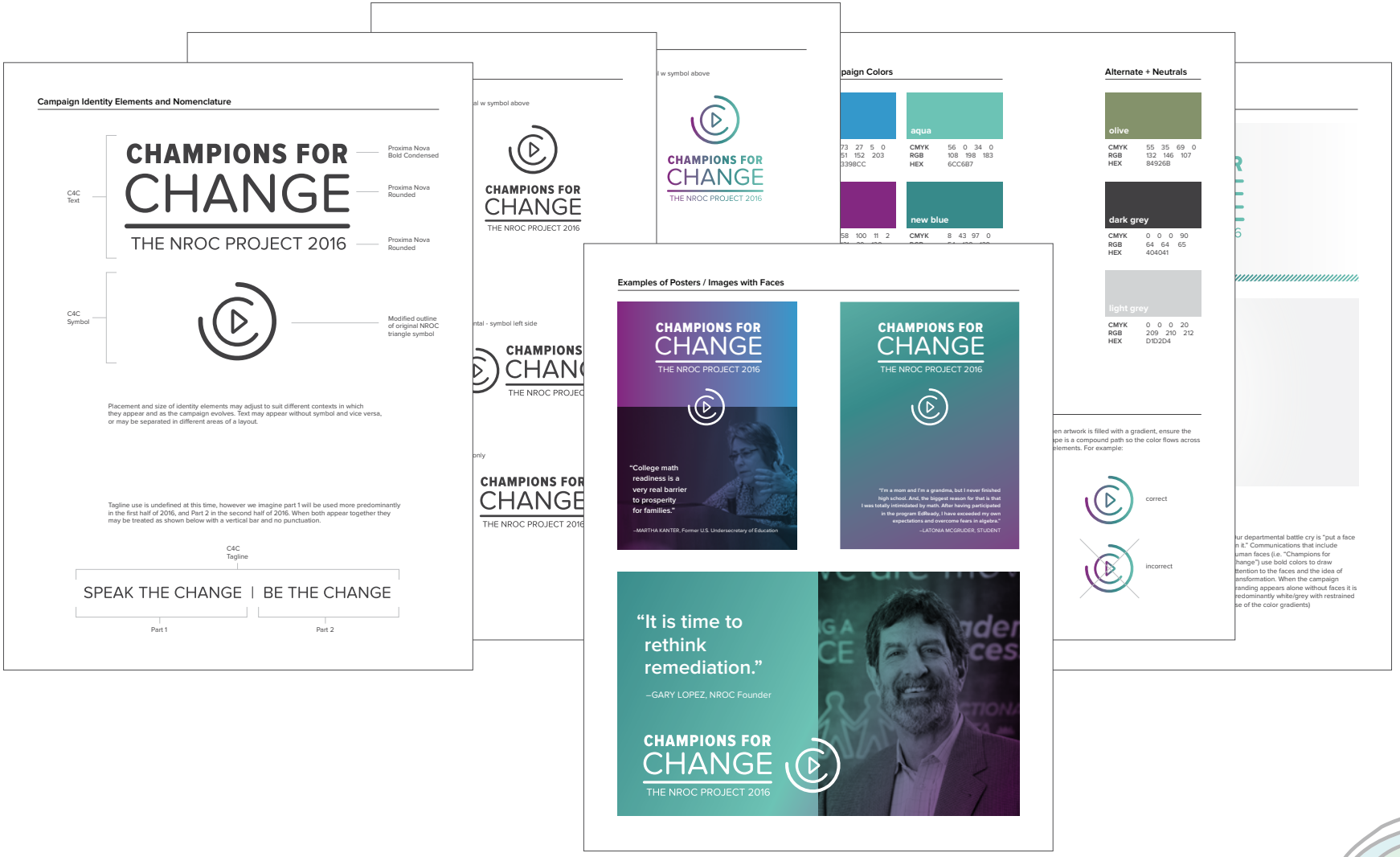
Lato is a free font you can download from Google fonts. It is also very legible and versatile.

Substitute any Serif you like for body text on in-house materials. Suggestion depends on what is installed on your machine.

YOUTH-CENTRIC

occasional bits of handwritten text are based on CrosswordBelle, free download on Dafont.com, .2pt stroke weight and 75pt tracking

visual style guides



creating a visual style guide

find and agree on your official logo

tagline? trademark?

decide on the official brand font(s)

1-2 usually sufficient; no more than 5

make sure everyone who needs access does;
select alternates for those who don't

decide on any typographic treatments

define color palette

set the RGB, CMYK and HEX color codes

appears different from screen to print and screen to screen

Red, Green, Blue (RGB) makes 16,777,216 colors!

messaging and editorial guides

what's included

collection of boiler plate text

tone and voice

grammatical rules

important terms, acronyms, proper names

how to create one? best way is after making brochure, one-sheet or website

will evolve, more so than the visual style guide

messaging and editorial guides

Editorial Style Guide for Yale University Publications

CHOOSING A STYLE [AP Style for Journalists / MLA Handbooks for Researchers / *Chicago Manual of Style* for Publishers] * RECOMMENDED STYLE [Consistency / Spelling / Titles: Italic or Roman / Some Punctuation Rules, with Examples / Compound vs. Single Words / Numerals] * YALE-SPECIFIC EDITORIAL MATTERS [Capitalization in References to Yale and Its Organizational Units / Lowercase for Abbreviated References / Capitalization in Yale Academic and Administrative Titles / Other Academic Terms Often Capitalized / Degrees / Yale Organizational Units with Ampersand] * COPYRIGHT—QUOTATIONS—CREDIT [Text / Images] * CONTACT INFORMATION

Recommended Style

In the absence of one clearly defined "Yale style," the Office of the Yale University Printer recommends a style that is based on the Chicago Manual and supplemented with a number of usages that apply specifically to Yale. This style is often referred to as "Bulletin style," as it is followed in the seventeen catalogs that make up the annual Bulletin of Yale University series. The basic elements of Bulletin style are summarized below.

Consistency

The hallmark of any style is consistency, which allows publications to avoid conflicting usage that, while not absolutely incorrect, can make a poor impression—especially for publications originating at an institution of higher learning. For instance, a writer has a choice between alternate spellings (adviser/advisor), alternate forms (online/on-line, Web site/website, toward/towards), number style (fifteen/15), and full spelling or abbreviations (5 percent/5%).

The writer or editor needs to take a deliberate and well-informed approach to such options. Two rules to follow are: (1) choose one form, do not use both indiscriminately (to avoid the impression of carelessness or casualness), and (2) choose the "better" of the options. How to decide which is better? This is where the present guide can be helpful.

Spelling

Use of the dictionary is the beginning—not the end—of this matter, because that resource offers both "adviser" and "advisor," "toward" and "towards," among other alternatives. The convention followed by most serious style manuals (including MLA and Chicago) is to use the preferred spelling in *Webster's Third New International Dictionary, Unabridged*, available online to Yale users at http://collections.chadwyck.com/home/home_mwd.jsp. The convenient desk model is the *Merriam-Webster's Collegiate Dictionary*.

The preferred form of a word is the first one listed in Webster's. Following this rule, Bulletin style selects "adviser" as the preferred spelling, rather than the one listed second (advisor). Similarly, preference goes to "toward" over "towards" (the latter defined as "var. [a variant] of *toward*").

Titles: Italic or Roman

Italic type is used for titles of books, plays, long poems that have been published separately, films, works of art, musical compositions, and art exhibitions:

Moby-Dick; The Collapse and Fall of the Roman Empire
Hamlet; Romeo and Juliet
Paradise Lost; Hart Crane's *The Bridge*
Citizen Kane
The Last Supper; Guernica
The Magic Flute; Carmen; Children's Corner Suite
the exhibition *Life, Liberty, and the Pursuit of Happiness: American Art from the Yale University Art Gallery*

Roman type and quotation marks are used for titles of stories, short poems, articles in a periodical, and chapter titles:

"Building a Fire," Jack London's short story
Robert Frost's "The Road Not Taken"
The column "The Uncertain Art" appears regularly in *The American Scholar.*
"New Forms of Worship," an article in *Journal of Religion*

3

Copyright—Quotations—Credit

One aspect of publishing that cannot be overemphasized is the approach to use of material by other writers or artists.

Text

No one preparing a publication, or even a document for internal distribution, should ever use another writer's work (that is, copy or duplicate it in a text) without observing three requirements:

1. Indicate that it is being quoted from another source—by use of quotation marks or other conventions (sometimes the typography is sufficient to set off an excerpt as a quotation: e.g., by using smaller type than the regular text in the document, or by
setting it off with spaces above or below), showing exactly
ts, is interrupted (if relevant), and ends.
inal text, and cite the author and standard publication data
ation, date of the edition used, and page numbers). Refer to
citation format.
essary. This is the most complex part of the transaction,
" in U.S. copyright law leave a certain amount of leeway. A
extensively from the work that is being reviewed (if rules
rt 4 of the *Chicago Manual of Style* discusses the question
t how much text can be quoted, and when permission is
yright holder. The *Chicago Manual* concludes: "As a general
ore than a few contiguous paragraphs of prose or lines of
ations, even if scattered, begin to overshadow the quoter's
9; www.chicagomanualofstyle.org/16/ch04/ch04_sec079.
f the publisher or author of the new text to obtain
t portions of material (applying the general considerations
ated sections). In some cases the copyright holder of the
for use of the quoted material.

ences, apply to the use of information that is being
round. It is imperative to properly attribute any discussion
deas from another author.

er visual material (including drawings, design elements,
b publication also requires permission from the copyright
btain permission in advance of publication and to pay fees
erial.

other useful documentation

brand promise/pillars/ philosophy

marketing plan or communication strategy

editorial calendar

decision-making flow diagram or decision ladder

project creative brief form

	PUBLISH DAY	VENUE	MEDIA	CATEGORY
	...mple	Blog	Case study	Direct Marketing
5	example	LinkedIn Group	Q&A	Brand Marketing
6	example	You Tube	Video	Digital Marketing
7	example	Scribd	Report	Marketing Research
8	example	Facebook	Poll	Social Media
9	example	Slideshare	Powerpoint	Digital Marketing
10	example	Select from list of strategic sites	Post	Blog Commenting
11	example	Twitter	Storify	Digital Marketing
12	example	Blog	Post	Social Media
13	example	Blog	Podcast	Digital Marketing
14	example	Select from list of strategic sites	Post	Blog Commenting
15	example	Flickr	Infographic	Digital Marketing
16	example	eNewsletter	Article	Direct Marketing

Editorial Calendar

project creative brief

Project Name

Owner

Timeline/Deadline

Format & technical specs

Overview

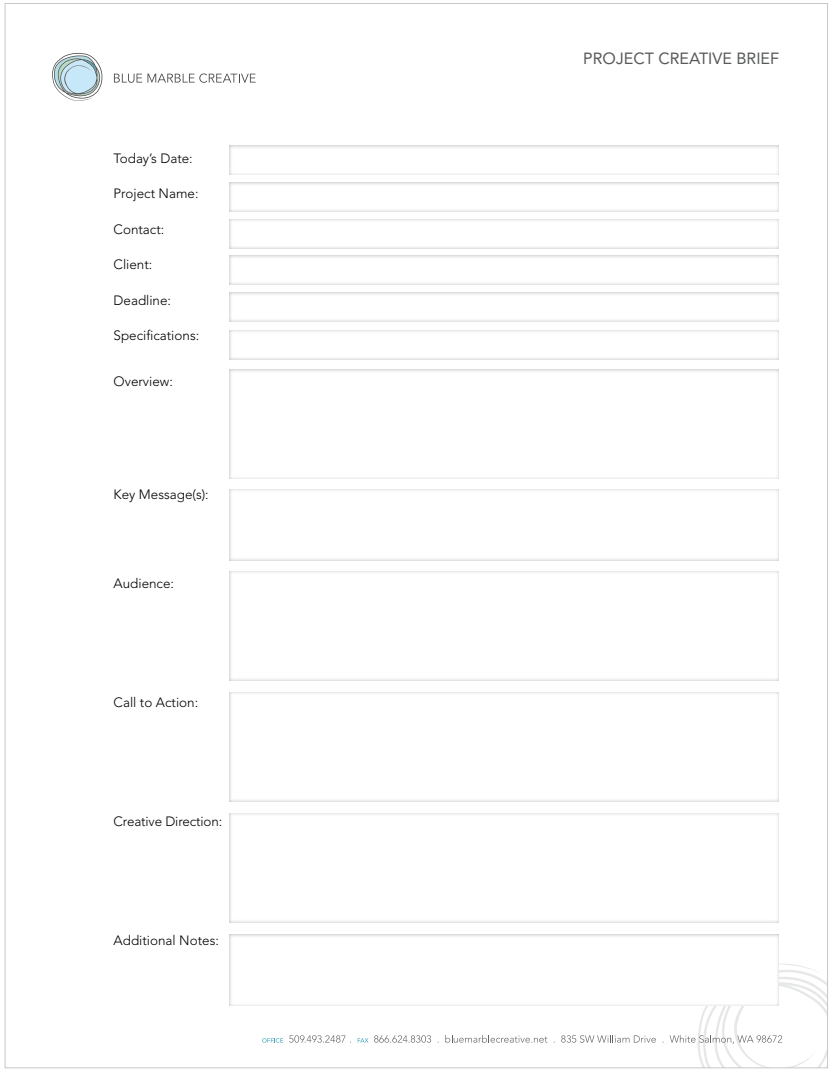
Key Message(s)

Audience(s)

Call(s) to Action

Creative Direction

Additional Notes



BLUE MARBLE CREATIVE

PROJECT CREATIVE BRIEF

Today's Date:

Project Name:

Contact:

Client:

Deadline:

Specifications:

Overview:

Key Message(s):

Audience:

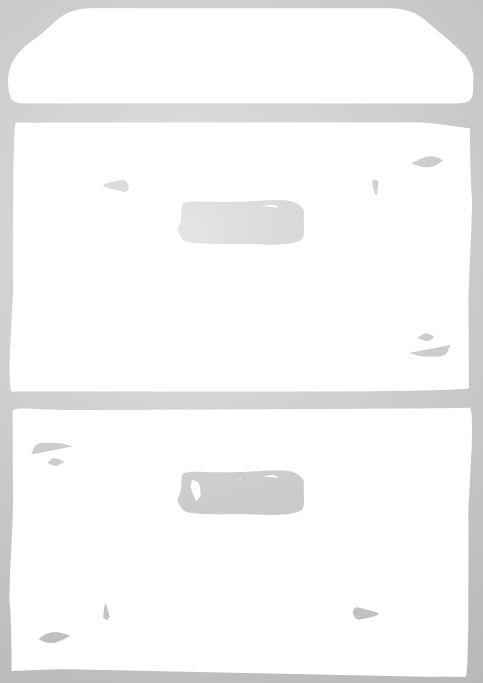
Call to Action:

Creative Direction:

Additional Notes:

OFFICE 509.493.2487 . FAX 866.624.8303 . bluemarblecreative.net . 835 SW William Drive . White Salmon, WA 98672

inventory and storage of brand assets



audit your communication materials

How does the brand look across materials?

Where are there inconsistencies
in message and style?

What types of materials are people
often creating?

What's missing?

kinds of assets might you have

logo files

- vector vs. raster
- versions—social media, favicon, horizontal & vertical, full color & b/w

images

- resolution

video and motion graphics

messaging blurbs

templates

technical information & login credentials

- website CMS
- web host
- domain name registrar

properly storing assets — how?

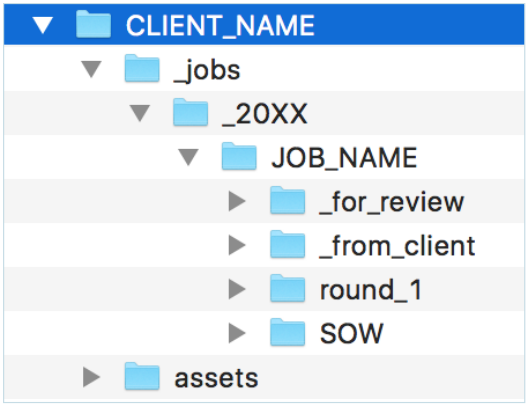
digital asset management (DAM) best practices

folder/file naming conventions

version control

knowing how the system works

consistent usage of the system



properly storing assets — where?

possible locations

cloud apps, an internal server, your website host server

provide an interface for access

online toolkits

private page on your website

interactive PDFs

THE NROC PROJECT

Style Guide

Select the NROC category to view its guide

The NROC Project | EdReady | NROC English

Logos

Download NROC_Logos.pdf
(vector editable source files for all logos)

Download NROC_Logos-images.zip
(a collection of .png images for print or digital use)

Colors

Dk Gray	Md Gray	Olive Md
R64 G64 B65	R128 G130 B132	R168 G170 B156
C0 M0 Y0 K90	C0 M0 Y0 K60	C36 M26 Y38 K0
#404041	#808284	#a8aa9c

Download NROC_Colors.pdf
(for further details)

Fonts

Internal NROC staff should default to Arial a
agencies and marketing staff for customer-fa

Templates and Marketing Collateral

MS Word document with Proxima Nova (*preferred*)
MS Word document with Arial
Current collateral
Learner, Teacher, and Leader Stories

New Marketing Requests

Fill out the form right here in the style guide or use this link to access the form anytime.

THE NROC PROJECT

NROC Marketing Request Form

Use this form to request assistance from the marketing department. Please provide as much detail and advanced notice as possible. Suggestions will be reviewed in the order they are received and prioritized as aligned with strategic objectives.

Your Name *

Project name *

Brand *

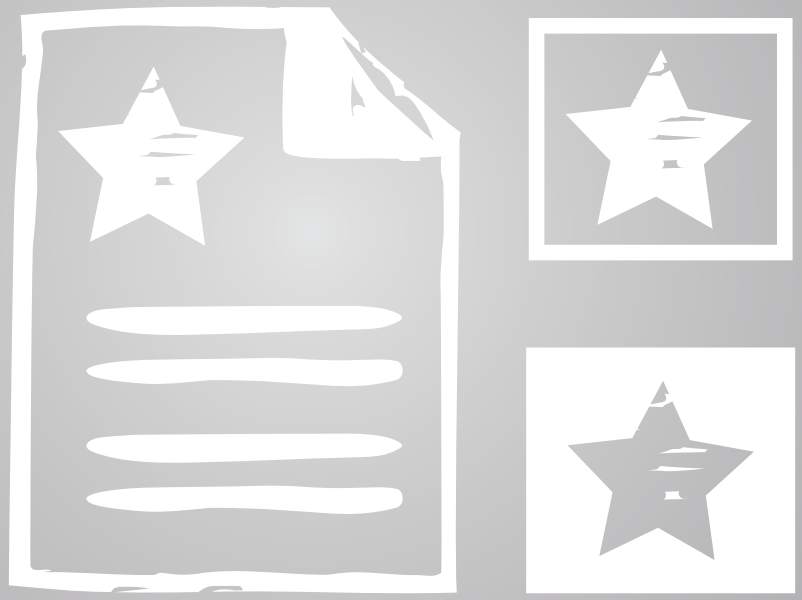
properly storing assets — who?

staff, outside partners and vendors

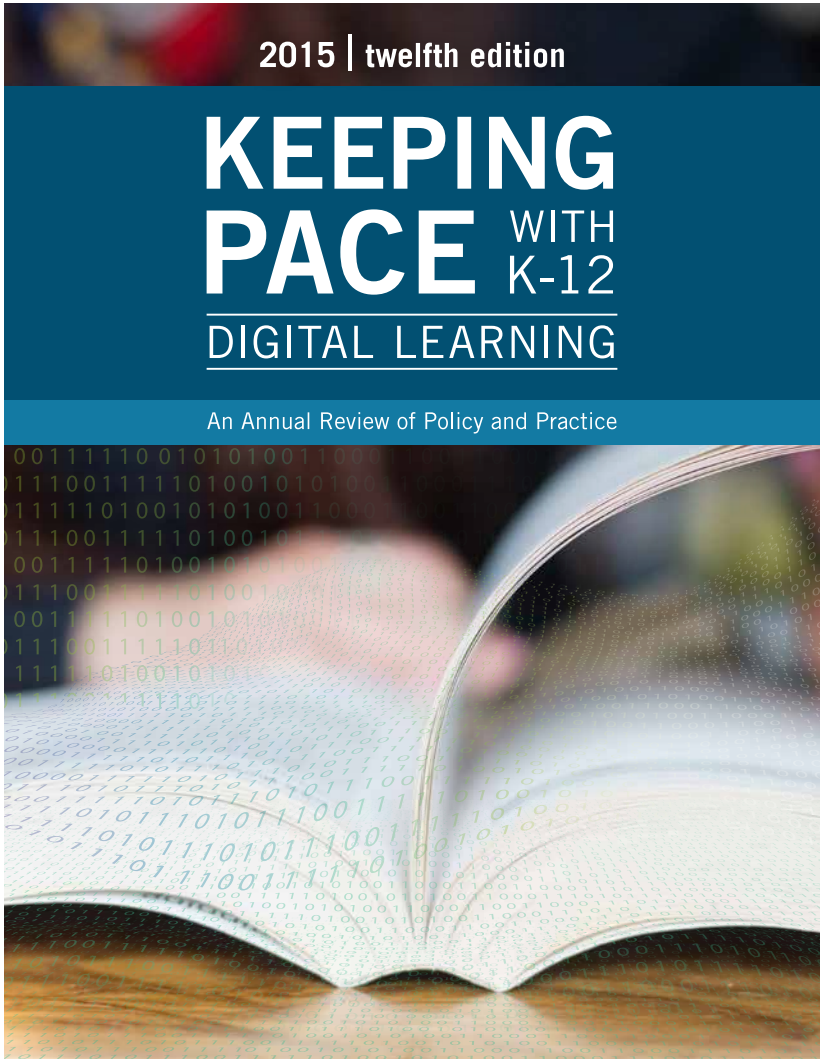
train everyone how to use the system

- periodic orientation sessions
- might be included as part of new employee onboarding
- make documentation that will survive changing of the guard

creating brand assets



basic design principles



whitespace

typography

visual hierarchy

color

images and video

basic design principles

What looks amateur?

clutter

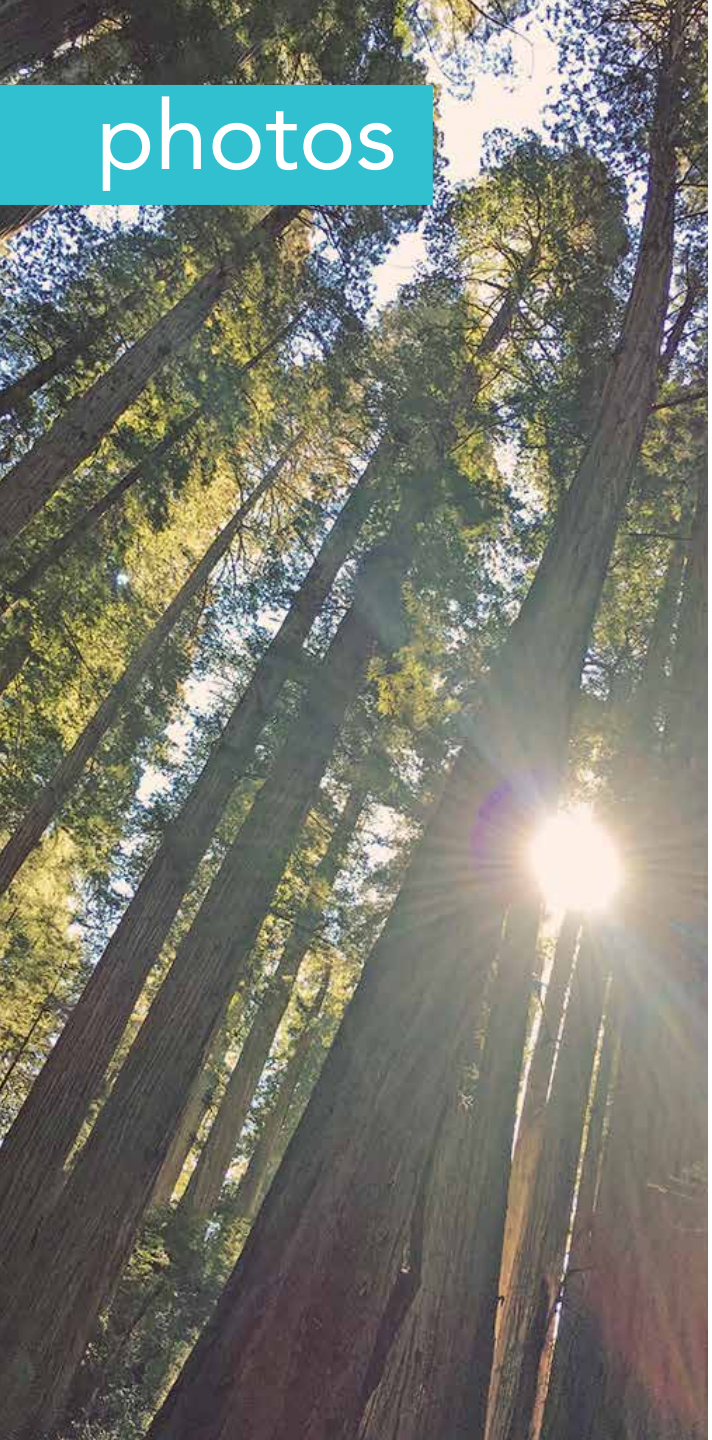
no clear visual flow

inconsistent margins, styles, type treatment

typos, general sloppiness with text formatting

using dated or meaningless effects on type and images

garish or unexpected colors



photos

self-generated

excellent for social media

professional photoshoot

your work in action, products, staff,
your work environment

stock photography

might be a primary source but
may be best as a visual supplement

lots of good stock but must be
sought out

copyrights

photos

rights-managed vs. royalty-free

model release?

fonts

licensed vs. free

illustrations

rights-managed vs. royalty-free

know your usage rights

tools for creating brand assets

Adobe Creative Suite

Canva

Picktochart

Sketch

Google Docs — Docs, Sheet, Slide

MS Office

working with templates

the blessing and the bane

takes a lot of the guesswork out, makes creating communication materials more efficient but…

… templates can’t read your mind

template tools: documents

Adobe InDesign/ Illustrator

- powerful & flexible
- long learning curve
- expensive

Google Docs

- cross-platform compatible
- cloud-based with built-in version control
- can open up MS Office files
- limited text styles

Apple Pages

- design-focused
- shareable with built-in version control
- only work on Macs

MS Word

- everyone knows it
- not cross-platform
- limited design & layout

template tools: presentations

Adobe PDFs

- allows you to use other programs for design of slides
- universal format

Google Slide

- cloud-based with built-in version control
- exports to PPT format

Keynote

- design-focused
- only work on Macs

MS PowerPoint

- everyone knows it
- limited design & layout

template tools: websites

WordPress

- powerful & flexible
- lots of control
- lots of responsibility
- ongoing costs over time

Squarespace (and other drag & drop website builders)

- easy & enjoyable
- less control
- minimal responsibility
- minimal costs over time

template tools: email

MailChimp

- free up to 2,000 subscribers
- easy drag & drop build
- less intuitive interface

Emma

- design-focused
- option to have a custom design made for you
- have a nonprofit edition

$49/mo for 2,500 subscribers

Constant Contact

- huge selection of templates
- 24/7 tech support

$40/month for 501 – 2,500

TinyLetter

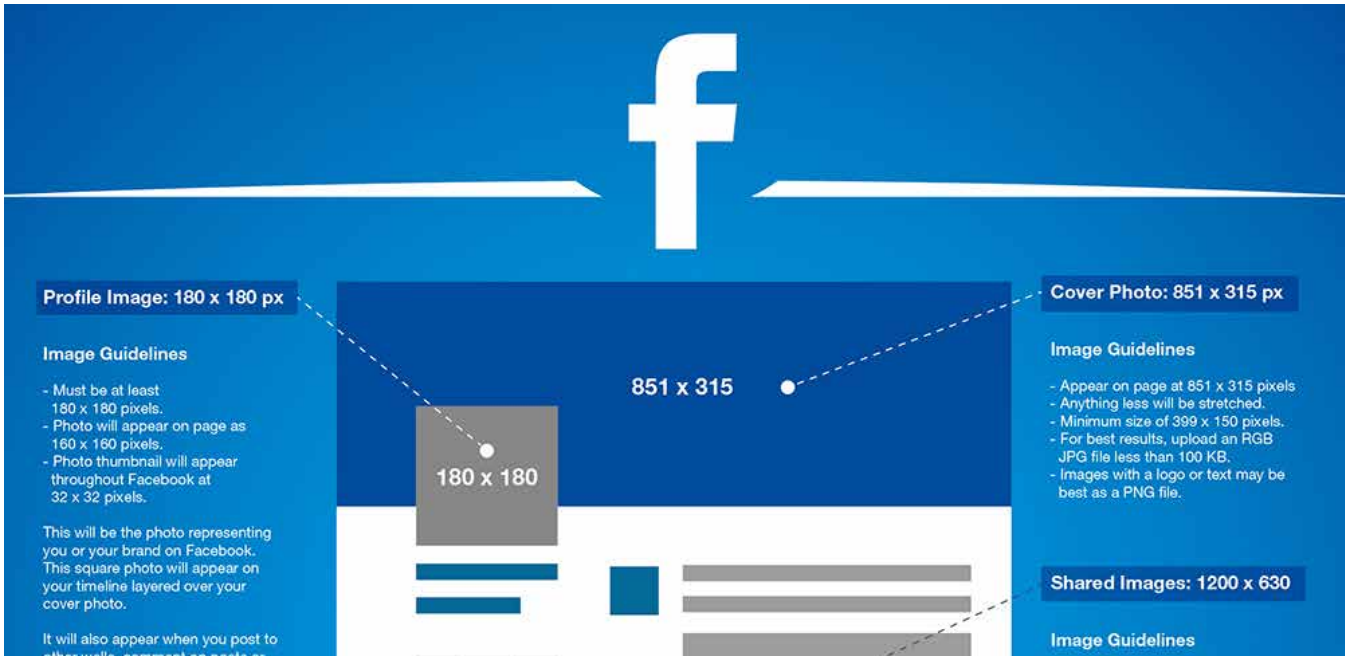
- free
- from people who made MailChimp
- unique format: stripped down & personalized
- minimal branding options

template tools: social media

dimensions are always changing

2016 cheat sheet

makeawebsitehub.com/social-media-image-sizes-cheat-sheet/



template tools: web forms

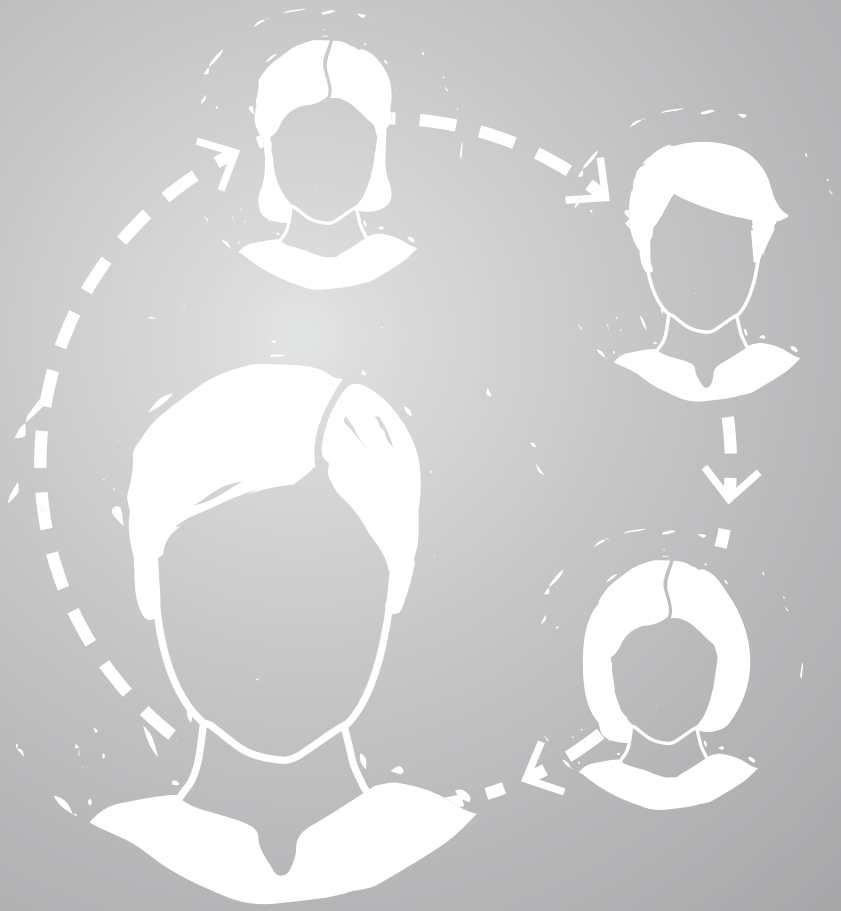
Google Forms

- free
- embed onto a webpage
- limited design

EmailMeForm

- free version should be sufficient
- flexible design & layout
- robust options

internal communications & workflow



internal communications & workflow

Have a design process

Employ good project management

identify the point person for outside partners

clear and consistent communication

assign tasks

involve all decision makers

internal communications & workflow

Establish a process for reviews and approvals

email is the *worst* way to collect feedback from a group

tools to use instead: ProofHQ, InVision, Trello, Smartsheet, comments in a PDF, web forms

assign deadlines to receive feedback

collect and consolidate edits first

skills

your first in-house designer

What do you *really* need them to do?

generalist vs. specialist

Basic technical skills to be looking for

HTML and CSS

Adobe Creative Suite (Photoshop, Illustrator, InDesign)

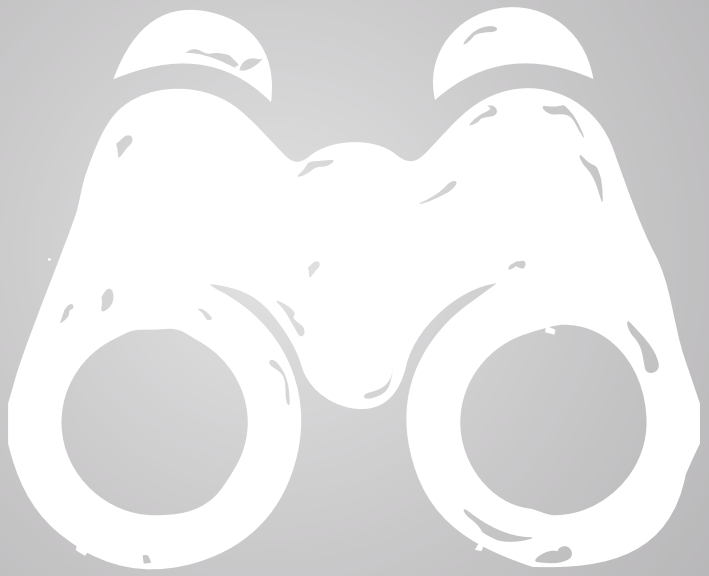
attention to detail

writing

How much oversight? How much can you give?

production assistant vs. experienced designer

brand guardianship



who's paying attention?

missed opportunities

not properly naming files and images for download/search

not branding your social channels

email addresses and email signatures

periodic staff education and training

periodic communication audits

keep your assets library updated

further help

contact us

building dynamic style guides

setting up online brand asset toolkits

creating branded templates

lisa@
bluemarblecreatve.net
509.493.2487

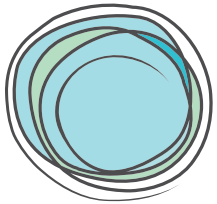
upcoming webinars

Using Imagery More Effectively

Developing a Messaging Platform

questions?

THANK YOU



BLUE MARBLE
creative

bluemarblecreative.net
info@bluemarblecreative.net