

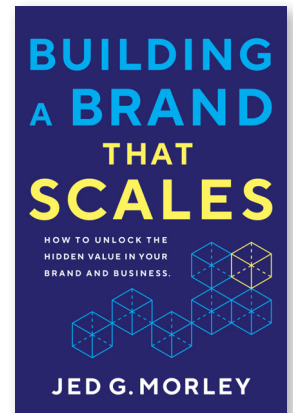


Executive Book Summaries[®]

Building a Brand That Scales

How to Unlock the Value in Your Brand and Business

by **Jed G. Morley**



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THE SUMMARY IN BRIEF

Many leaders and teams struggle to scale their businesses while keeping their brands distinct and meaningful. In a crowded marketplace, success comes not from louder messaging but from making and keeping a clear, resonant promise to customers, consistently.

In *Building a Brand That Scales: How to Unlock the Hidden Value in Your Brand and Business*, Jed G. Morley offers a strategic roadmap for companies that want to grow without losing their core identity. Morley, founder of Backstory Branding, helps organizations bridge the divide between brand marketing and performance marketing. His approach shows how clarity of purpose and aligned messaging across teams and customer touchpoints can drive both revenue and long-term brand loyalty. Using his proprietary Backstory Brand Wheel™ Framework, Morley explains how to transform your brand from a vague concept into a scalable business asset.

Whether you're a startup or an established company looking to reinvigorate growth, this book provides practical tools to build a brand that aligns with who you are and what your customers truly value.

IN THIS EXECUTIVE BOOK SUMMARY:

- Learn how to shape customer perception through clear, compelling brand strategy.
- Understand how to communicate your value consistently across all channels and teams.
- Find out how to align internal teams with unified verbal, visual, and experiential guidelines.
- Learn how to drive growth by tailoring messages to each stage of the customer journey.
- Get useful advice on how to codify your brand's culture and purpose for lasting differentiation.

Preface

In college, I studied graphic design, thinking I could learn to build great brands if I could just learn how to design an iconic logo like the Nike Swoosh. I soon learned that there is more to building a brand than designing a memorable logo. In grad school, I discovered the power of consumer insights and the need to get below the surface to understand why brands do or don't connect with customers on an emotional level.

Working at IDEO, the global design and innovation consultancy, and witnessing its design-thinking principles, I saw the significant impact human-centered insights can have on creating connections and winning business models.

This is dedicated to leaders and teams who are committed to building a brand that scales by setting their brands apart from the status quo and forming lasting relationships with their customers by consistently making and keeping a meaningful promise.

The principles I share come from over twenty years of experience, culminating in lessons learned from collaborating with dozens of businesses and brands at my brand strategy and messaging consultancy, Backstory Branding (Backstory), where we aim to build brands that live up to their promise. Our proven process consistently results in brand breakthroughs that accelerate growth and maximize the value of companies at exit. If your brand is stuck, underdeveloped, or undefined, this book is for you.

Chapter 1: A Different Kind of Wheel of Fortune

Some brands get big by getting lucky. They stumble into success and somehow manage to grow without much forethought. However, most brands that scale do so on purpose. Creating an intentional brand strategy gives you a much better chance of building a brand that can grow with your business, generate more revenue, and make a more significant impact in the world.

What is a Brand?

At Backstory, we define a brand as the perception someone has of a particular person, place, thing, or idea. No perception, no brand. Branding includes the thoughts and feelings we have when we think of a brand name and the reputation, value, and cultural currency it represents.

Customers determine what your brand is based on their cumulative experiences with it, and the branding process creates those experiences intentionally. You know you have a brand when your proper noun (i.e., capitalized) brand name becomes synonymous with the common nouns customers use to describe or search for solutions to their wants and needs.

Your business may own its brand name, logo, and tagline, but customers ultimately own brands because they decide what they stand for and, consequently, determine their value. You can *influence* what customers think of your brand, but you can't decide what it means to them. Everyone who works with you—employees, contractors, partners, and agencies—makes an impression on behalf of your brand, for better or worse. Defining what your brand stands for and providing your team with guiding principles for consistently communicating that meaning ensures everyone on your team can be an effective brand ambassador.

The Backstory Brand Wheel Framework

The Backstory Brand Wheel Framework is a complete tool set that can guide your company through the process of getting its story straight inside and out to help you achieve and sustain the alignment required to build a brand that scales. The four-phase framework is simple for nonmarketers to understand and implement and is meaningful to marketing professionals who want tools and inspiration to do their best work.

- Phase 1 is Brand Discovery, the place where you uncover insights into your current and desired brand perceptions.
- In Phase 2, Brand Foundation, you clarify and articulate the ideas needed to communicate the five foundational elements of your brand story, including your brand purpose, brand position, brand promise, brand pillars, and brand personality.
- The focus of Phase 3 is Brand Expression, where you'll build on your Brand Foundation (i.e., brand platform) by defining the attitudinal and behavioral characteristics of your ideal customers, articulating the value you provide them, naming your brand, creating your visual brand identity, and defining the guiding principles for the visual, verbal, and experiential aspects of your brand.
- Phase 4, Brand Activation, aids you in consistently and correctly communicating your brand across all your

Familiarity can blind us to the changes we must make for our brands to be great.

customer touch points to drive brand performance and profitable growth.

The point of this framework is to simplify and systemize the branding process. These straightforward brand definitions and methods have been designed to help executives and functional teams effectively develop a shared branding vocabulary and work together to achieve their brand goals.

PHASE 1: BRAND DISCOVERY

This phase focuses on understanding your current and desired brand perceptions and determining what gaps exist between them. Finding these gaps informs your brand strategy by identifying the words, images, and experiences needed to create your desired brand perception.

Four types of insight inform brand strategy: company insight, customer insight, competitor insight, and creative insight. Great brands are born where these insights intersect.

Chapter 2: In-depth Interviews

The first step in Brand Discovery is interviewing individuals who have valuable insights into your current and desired brand perceptions. These in-depth interviews should include one-on-one conversations with your company leaders and customers who can provide meaningful and diverse perspectives into your brand and business in context of the competitive landscape.

Good interviews come from selecting and curating a group of insightful, opinionated, and articulate participants. Each should be willing and able to discuss what they think and feel about your brand and category and, most importantly, *why*.

Asking Expansive Questions

The most fundamental skill to develop and apply in conducting effective interviews is to ask thought-provoking, open-ended questions. The goal is to invite the people being interviewed to open up and share more, not shut them off with simplistic, yes or no questions that drive the conversation down a dead end.

The Brand Ladder Method

You can improve your interviews by focusing on the interviewee's purpose or reason for their answers. Discovering a rich "why" vein of golden insights to mine becomes more predictable and repeatable when you use the Brand Ladder Method.

This method operates on four levels of insight: features, benefits, feelings, and values. Great brands communicate and connect with their customers on all four levels.

Four seemingly simple questions can help you build a brand ladder that unlocks strategic insights into your customers' wants and whys:

- **Features:** Of all the things that set this brand apart, which one matters most to you?
- **Benefits:** What are the benefits of that feature, and which one matters most to you?
- **Feelings:** How does having that benefit make you feel?
- **Values:** What is important about feeling that way?

Interview Guidelines

Following some simple guidelines can make a big difference in making interviews more valuable:

- THINK FIVE AND FIFTEEN
- BE SELECTIVE
- DO YOUR HOMEWORK
- GET THEIR NAME AND A BRIEF BIO
- PRETEND YOU KNOW NOTHING
- BE PREPARED TO OFF-ROAD
- BE COMFORTABLE WITH QUIET
- ASK JUST ONE QUESTION AT A TIME
- GUIDE THE DISCUSSION
- TAKE TRIGGER NOTES
- DON'T SETTLE FOR SATURATION

- HAVE THEM CLARIFY WHAT THEY MEAN – IN THEIR OWN WORDS
- DON'T CORRECT THEM
- RECORD THE INTERVIEWS
- TRANSCRIBE THE INTERVIEWS
- CODE THE INTERVIEWS
- COMPLETE THE INTERVIEWS WITHIN A FOCUSED TIMEFRAME
- SEE WHAT THEY'RE SAYING
- INTERNAL INTERVIEWS
- EXTERNAL INTERVIEWS

Tripping Over the Truth

Strategic branding leaders and practitioners tune their antennae to recognize significant insights in the moment. The Brand Discovery process systematically prepares your mind to more fully identify, appreciate, capture, understand, and act on insights however subtle those signals might be. Without this heightened awareness, we may “trip over the truth” without realizing what we’ve stumbled upon.

Chapter 3: Brand Audit

Familiarity can blind us to the changes we must make for our brands to be great.

Following our four-step process for conducting brand audits – gather, score, evaluate, and plan – can help. Please note the brand audit process applies to brand refresh and rebrand projects. You can skip this step altogether if you’re creating a new brand.

Step 1: Gather. Gather representative examples of the brand touch points your organization currently creates, delivers, and facilitates for internal and external audiences. Brand touch points include the words, images, and experiences contributing to the perceptions—intentional or not—that internal and external audiences have of your brand.

Step 2: Score. Once you’ve collected a well-rounded cross-section of brand touch point inputs, weigh and sort them based on their perceived value to your audiences and compare the relative importance of your audiences to one another. Conducting internal and external customer interviews and surveys can help inform this process—specifically, which touch points matter most to your most important audiences and why.

Step 3: Evaluate. Once you’ve collected examples of your current brand touch points, evaluate the degree to which they add to or subtract from how you want audiences to perceive your brand. Next, rank their relative importance to your customers and other audiences. Evaluation methods include customer surveys, in-person or by-phone interviews, and videoconference calls.

Step 4: Plan. Take time to review the findings of your brand evaluation and extract general guiding principles from them for your brand strategy. Rather than getting bogged down in the details, summarize actionable, high-level brand takeaways and enlist the help of the right individuals and teams to take your brand where you want it to go.

Chapter 4: Competitive Analysis

Competition can bring out the best in us when we are committed to winning the hearts and minds of our customers. Competitive analysis is an essential ingredient in creating an effective brand strategy. It helps you gain a more objective understanding of whether or not your offering is truly differentiated. Knowing who your competitors are and how you win against them from a customer perspective puts you in a position of strength because it shows you how they view the market.

PHASE 2: BRAND FOUNDATION

Like the firm foundation of a building, your Brand Foundation helps ensure the strength and structural integrity of your brand for years to come. A strong Brand Foundation helps you build your brand in a way that is aligned and congruent with your brand strategy to reinforce your desired brand perception.

Chapter 5: Brand Purpose

Simon Sinek popularized the idea of building a purpose-driven organization and creating brand stories that *Start with Why*. His framework revolves around insights into how the human mind works, starting with why the people do what they do, then *how* they do what they do, followed by *what* they do.

According to Roy Spence, the adman who built the advertising agency GSD&M, which developed successful brands for Southwest Airlines, Walmart, DreamWorks, the PGA Tour, the United States Air Force, and the Texas Department of Transportation, purpose is a definitive statement

Resonating with your customers is the ultimate desired outcome of effective marketing messaging.

about the difference you are trying to make in the world. Spence further clarifies these reasons why you should want a purpose statement for your organization:

- Purpose drives everything.
- Purpose fosters visionary ideas and meaningful innovation.
- Purpose moves mountains.
- Purpose will hold you steady in a turbulent marketplace.
- Purpose injects your brand with a healthy dose of reality.
- Purpose recruits passionate people.
- Purpose brings energy and vitality to the work at hand.
- Purpose contributes to a life well lived.

A memorable, motivating purpose statement needs to be authentic. There is no cookie-cutter template to create yours; it has to be true and genuine to your organizational and personal values. Here are a few guidelines to get you there.

- **Inspirational and motivational.**
- **The aperture principle** (*being specific enough but not so specific as to box your business in*).
- **Keeping it simple and keeping it real.**
- **Room for more.**
- **Different means to the same end.**

Sharing Your Purpose

Once you have clarified your purpose, created authentic and effective mission, vision, and values statements, and written down your recipe for success by codifying your culture, you have to teach them to your employees over and over again.

You'll need to bring your employees, investors, and other stakeholders on board by helping them understand and appreciate the significance and stories behind these things. They need to believe and buy into your purpose so they can make it real for themselves by creating and sharing stories of their own.

Chapter 6: Brand Position

Your brand position consists of the words and ideas customers associate with your brand name. When you think of brand position, think of brand perception.

The first step in the brand positioning process is determining what words and ideas customers currently associate with your brand compared to your desired brand perception. Current perceptions define your statement of brand position.

To change your brand from its current perception to the one you want, you need to make intentional, deliberate, and consistent choices to reinforce your desired brand perception from the customer's point of view.

Reframe the Narrative

Creating a strategic brand narrative can elevate your brand positioning and help you close the gap between your current and desired perception. Although the applications vary from one practitioner and framework to another, the guiding principles for setting your brand apart with a compelling narrative remain the same.

- **Principle 1. Make your customer the center of your story.**
- **Principle 2. Show your customers how their world has changed by creating a problem they can't afford to ignore.**
- **Principle 3. Show customers what life could be like with their problem solved.**
- **Principle 4. Define the criteria for success on terms only you can satisfy.**

Chapter 7: Brand Promise

At its most basic, building a brand is making and keeping a meaningful promise at scale. Your brand promise is the overarching value you deliver to customers – *overarching* meaning your brand promise is audience-agnostic. A well-crafted brand promise is a meta-benefit statement that resonates with all your audiences all at once—that is music

to their ears regardless of their unique pain points and reasons for buying.

Chapter 8: Brand Pillars

Having defined your brand purpose, position, and promise, you've laid a strong Brand Foundation for building. The next step in developing your brand is to set forth your brand pillars – the five most significant reasons you win. Your brand pillars make a case for why customers should prefer and choose your offering over alternatives.

Find Your Pillars

Identifying the five most important success factors is a blend of thinking about what customers need to succeed and what sets your offering apart. A helpful exercise to facilitate this process is creating a simple value curve chart in Microsoft Excel or Google Sheets that shows what customers want in a solution for a particular problem and scoring your offering's ability to satisfy those needs compared to competitors' offerings.

Chapter 9: Brand Personality

Creating a distinct personality for your brand starts by choosing modifiers (adjectives) that define your brand and can guide the ongoing creative efforts of everyone who's working on giving expression to your brand and bringing it to market – from your ads, content marketing, social media, and PR to your internal employee and investor communications.

A strategic, thoughtful, coordinated, and consistent approach to defining your brand personality and aligning everyone to it helps reinforce what your brand stands for in customers' minds. Each customer touch point, campaign, and creative contribution ought to reinforce your desired brand perception and enhance your brand equity with customers—like compounding interest—rather than allowing random weathervane acts of marketing to take your brand in whichever direction the wind blows.

By clearly defining your brand personality and consistently expressing it throughout all your brand communications, you help customers understand what you stand for and attract customers who share your values and brand sensibility.

PHASE 3: BRAND EXPRESSION

This phase is about defining the words, images, and experiences that will shape and influence how customers see and value your brand – your brand perception.

Chapter 10: Marketing Messaging

Resonating with your customers is the ultimate desired outcome of effective marketing messaging. Resonance results from solving a significant customer problem and communicating your solution's features, advantages, and benefits so customers recognize they can't afford not to change what they're doing and how they're doing it.

Creating resonant marketing messages starts with an in-depth understanding of who your audiences are, what they want, and the problems that stand in their way of getting it – issues your solution is uniquely qualified to resolve for them.

You can only create clear, consistent messaging that communicates the problem-solving capabilities of your solutions when you have validated your business model and achieved product-market fit.

Chapter 11: Brand Narrative

A compelling, intriguing, and consistent explanation of who you are, what you do, why it matters – and to whom – is *crucial to building a brand that scales*.

Being ready to answer these foundational questions, both in spoken and written communication, goes a long way to setting you and your organization apart in meaningful, memorable ways. A strategic brand narrative consists of three parts: a one-line elevator pitch, a one-paragraph about us statement, and a one-page company overview.

It takes about three seconds to share your elevator pitch, thirty seconds to read your about us statement, and three minutes to read your company overview. These three degrees of detail give you flexibility in meeting the demands of different situations and scenarios. Having each of them ready to go can facilitate meaningful connections with employees, customers, investors, and partners.

Chapter 12: Brand Name and Visual Brand Identity

Learning what makes brand names and visuals meaningful is a blessing and a curse. Once you become aware, you see missed opportunities everywhere. Of course, you see great examples, too, which inform good decisions when it's your turn to give clear, creative direction and make creative choices that serve your brand well.

Naming a brand that can scale and creating an appropriate visual brand identity for it should be a strategic, intentional process with the goal of reflecting the character and personality of the brand in a way that resonates with your customers. It should always be a name and identity the brand can grow into over time.

There are four main types of brand names:

- **Descriptive** – depicting what a company is or does.
- **Suggestive** – implying what a company is or does.
- **Arbitrary** – using real words in an unexpected context.
- **Fanciful** – made-up words like Kodak or Xerox.

Another important consideration in naming your brand is giving equal, if not greater, emphasis to how it sounds when spoken, not just how it looks in writing.

Visual Brand Identities

Designing a visual brand identity that can scale with your business as it grows starts by defining a clear brand strategy, including its brand personality. Without a clear strategic direction for your brand, selecting a logo design can default to personal preference and decision by committee—the worst method of all. Instead, use objective criteria to guide the design evaluation process to create a logo that reflects your desired brand perception.

PHASE 4: BRAND ACTIVATION

The ultimate aim of the Brand Activation phase of the brand-building process is to build your brand while building your business. Some would have you think these goals are at odds with each other; that it's an either-or proposition, but we disagree. We believe in blending both brand *and* performance marketing simultaneously so you get the best of both worlds.

Chapter 13: Customer Touch Points

Creating and maintaining alignment in bringing your brand to life is a never-ending process because circumstances and inputs constantly change. Consistently and effectively activating your brand requires constant focus, detailed attention, and continual refreshing.

Every interaction between you and your brand is a customer touch point. The personal impressions from all your brand touch points meld in customers' hearts and minds to form an overall picture of your brand and a feeling that

gives customers confidence in buying and recommending your brand—or not. Because everyone who works for your organization creates or contributes to customer touch points in some way, branding is everyone's responsibility, not just the marketing team's.

Following The Backstory Brand Wheel Framework can help you identify the right audiences and messages to make your marketing dollars work harder for you. Creating cohesive, cogent, consistent brand touch points is vital, but so is defining the right audiences and messages to share with them. It doesn't do your brand or business much good to consistently communicate the wrong messages to the right people and vice versa.

Conclusion

The purpose of our work at Backstory is to build brands that live up to their promise. Our job is to discover and define what is and isn't the essence of a brand and reveal it by removing anything that isn't essential. What our clients receive as a result of this process is pure relevance and resonance with their audiences.

What had been an incomplete idea of what they have been or could become is transformed into a clearly defined and refined concept as well as a clearly and consistently communicated idea, story, and relationship that resonates deeply with their ideal customers.

Here, you're given a methodology for bringing your vision to life as you consider what to paint on your brand canvas and sculpt in your studio. You can leverage this process to define your brand and bring it to market at a level that expands your capacity beyond what you can do yourself. With the help of talented teams who follow the process and work within the brand guidelines you've established, the collective work can be true to your standards.

The result is a great brand that is bigger than you and your ability to touch every aspect of it—a purposeful brand that can make a difference for good in the world beyond making money.



Jed G. Morley is the founder and CEO of Backstory Branding, a brand strategy and messaging consultancy focused on helping companies build brands that deliver on their promise. He has guided dozens of businesses in clarifying their purpose, defining their value, and codifying their culture to support growth. Jed holds a BA in design from Brigham Young University and an MS in Integrated Marketing Communications from Northwestern University. Outside of work, he enjoys supporting the performing arts with his wife, Angie, spending time with family, cycling, and exploring Swedish genealogy.

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