



# Branded Interactions Strategy Worksheet

This worksheet walks you through a 7 step process for developing a branded interactions strategy table to include in your current brand book. This table defines appropriate opportunities for injecting your organization's brand personality into your website interactions.

# STEP 1: Define your Brand as a person

Age: \_\_\_\_\_

Gender: \_\_\_\_\_

Occupation: \_\_\_\_\_

Hobbies: \_\_\_\_\_

What are some other lifestyle details?

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What does this person do for fun?

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How would others describe their character?

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Chart your Brand personality on these continuums.

|                     |       |                     |
|---------------------|-------|---------------------|
| <b>Professional</b> | _____ | <b>Personable</b>   |
| <b>Thoughtful</b>   | _____ | <b>Spontaneous</b>  |
| <b>Traditional</b>  | _____ | <b>Modern</b>       |
| <b>Established</b>  | _____ | <b>Innovative</b>   |
| <b>Serious</b>      | _____ | <b>Fun-loving</b>   |
| <b>Exclusive</b>    | _____ | <b>Approachable</b> |

## STEP 2: Pick specific personality traits

Our Brand looks:

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Our Brand sounds:

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Our Brand acts:

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The essence of our Brand is:

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### Example traits

|               |              |              |             |
|---------------|--------------|--------------|-------------|
| Accountable   | Courageous   | Happy        | Organized   |
| Adaptable     | Creative     | Hard Working | Peaceful    |
| Adventurous   | Curious      | Honest       | Planner     |
| Alert         | Dedicated    | Honorable    | Playful     |
| Ambitious     | Determined   | Humorous     | Polite      |
| Appropriate   | Diplomatic   | Imaginative  | Powerful    |
| Assertive     | Directive    | Immaculate   | Practical   |
| Astute        | Disciplined  | Independent  | Proactive   |
| Attentive     | Dynamic      | Initiates    | Productive  |
| Authentic     | Easygoing    | Innovative   | Punctual    |
| Aware         | Effective    | Inquiring    | Reliable    |
| Bravery       | Efficient    | Inquiring    | Resourceful |
| Calm          | Empathetic   | Integrates   | Responsible |
| Candid        | Empowers     | Integrity    | Sincere     |
| Capable       | Energetic    | Intelligent  | Skillful    |
| Certain       | Enthusiastic | Intentional  | Spiritual   |
| Charismatic   | Ethical      | Interested   | Spontaneous |
| Clear         | Excited      | Intimate     | Stable      |
| Collaborative | Facilitates  | Joyful       | Strong      |
| Committed     | Fairness     | Leading      | Successful  |
| Compassion    | Faithful     | Listener     | Supportive  |
| Comradeship   | Fearless     | Lively       | Tactful     |
| Connected     | Flexible     | Logical      | Trusting    |
| Conscious     | Friendly     | Loyal        | Trustworthy |
| Considerate   | Generative   | Networker    | Truthful    |
| Consistent    | Generosity   | Nurturing    | Versatile   |
| Contributes   | Gracious     | Open-Minded  | Vibrant     |
| Cooperative   | Gratitude    | Optimism     | Warm        |

## Step 3: Create a top task list

## List your user's most critical tasks.

*Tasks required to fulfill an organizational promise*

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

### List your user's most common tasks.

Tasks at least 80% of your users want to perform

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper has a slight shadow on its right side, suggesting it's resting on a surface.

## Step 3: Create a top task list (continued)

## Combine critical and common tasks into 1 list

*Put the critical tasks at the top of the list.*

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

## Delete similar tasks

*If 2 or more tasks have similar workflows, delete all but 1.*

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

## NOTES

The list left after deleting similar tasks is your top task list. Try to keep this list between 10-15 tasks.

## Step 4: Identify and label interaction points

## User to Brand interactions points

Label each interaction point as either **required**, **expected**, or **delightful**.

[illegible][illegible]

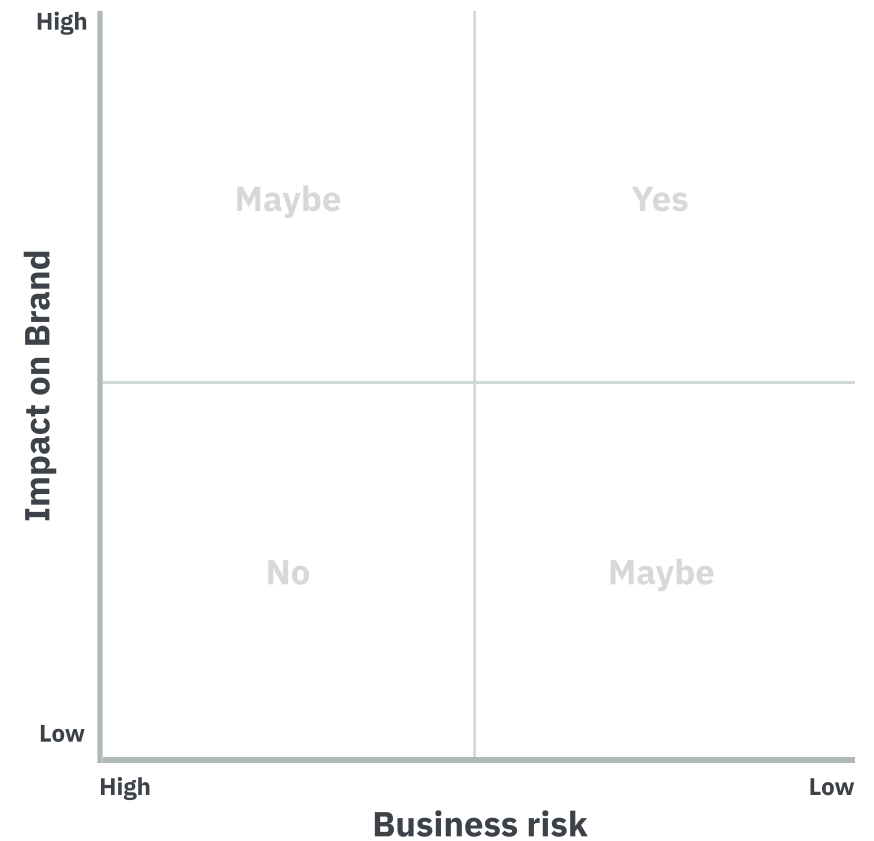
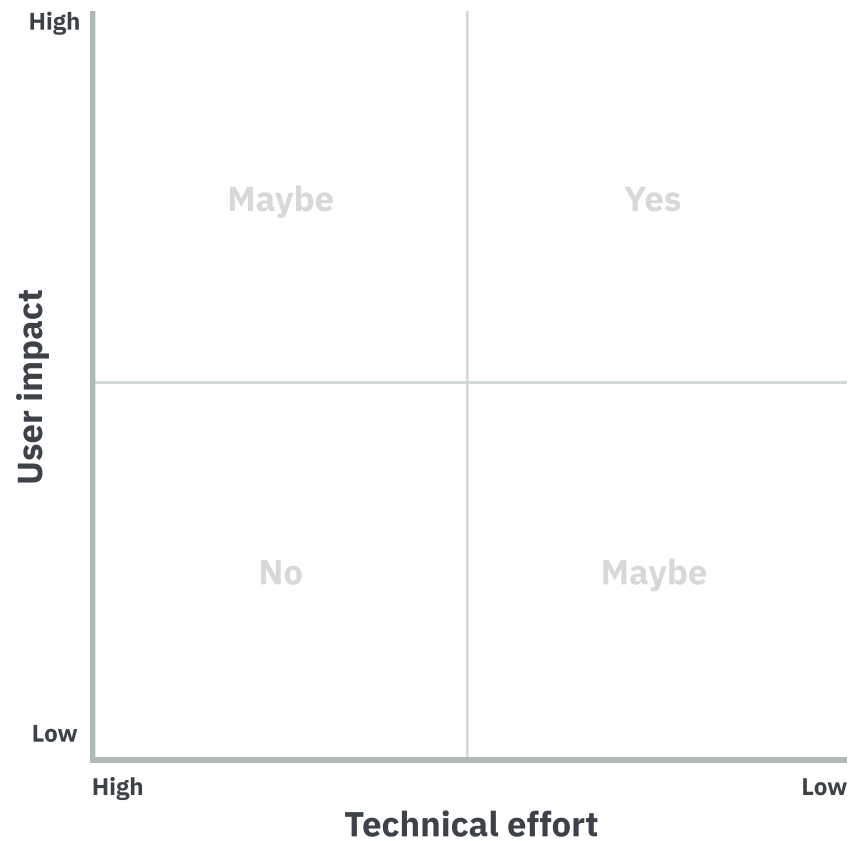
## Label definitions

Required - Interaction points users must do for your system to work

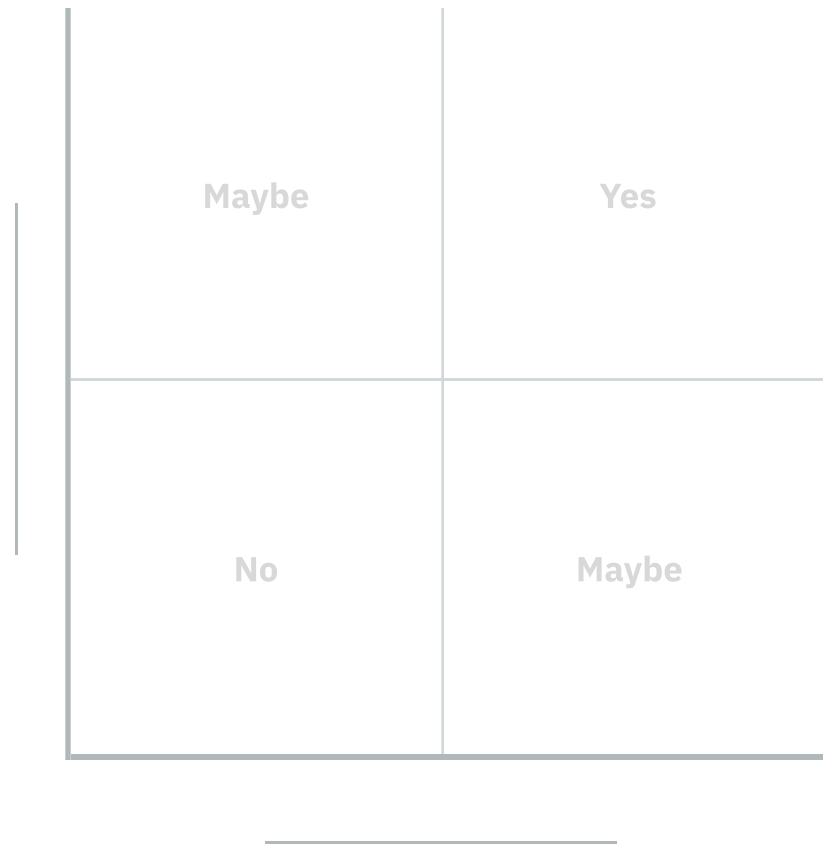
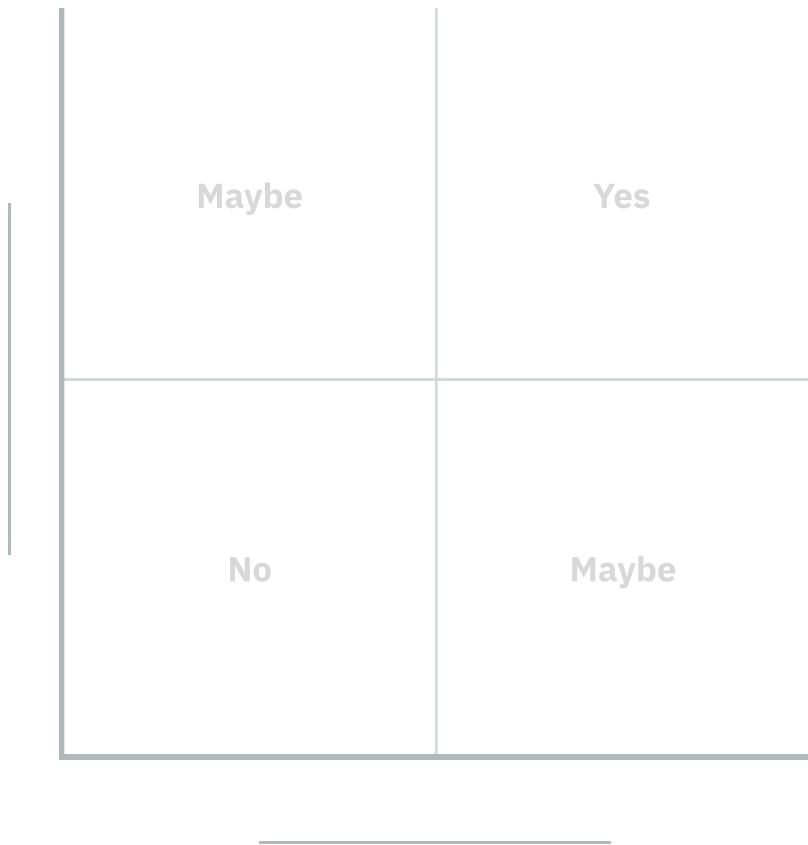
Expected - Interaction points the user knows they will encounter before they execute a task

Delightful - Interaction points the user did not foresee but finds positive

## Step 5: Prioritize interaction points (examples)



## Step 5: Prioritize interaction points (templates)



## Step 6: Create a branded interactions table

| Personality traits | Interaction points |  |  |  |  |  |  |  |
|--------------------|--------------------|--|--|--|--|--|--|--|
|                    |                    |  |  |  |  |  |  |  |
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|                    |                    |  |  |  |  |  |  |  |
|                    |                    |  |  |  |  |  |  |  |

## Step 7: Planning your interactions guide timeline

| Long term objectives                  | Milestone date #1:<br>_____ | Milestone date #2:<br>_____ | Milestone date #3:<br>_____ | Milestone date #4:<br>_____ | Milestone date #5:<br>_____ | Milestone date #6:<br>_____ |
|---------------------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
| Creating your interactions guidelines |                             |                             |                             |                             |                             |                             |
| ①                                     | ①                           | ①                           | ①                           | ①                           | ①                           | ①                           |
| ②                                     | ②                           | ②                           | ②                           | ②                           | ②                           | ②                           |
| ③                                     | ③                           | ③                           | ③                           | ③                           | ③                           | ③                           |
| Project success measurements          |                             |                             |                             |                             |                             |                             |
| ①                                     | ①                           | ①                           | ①                           | ①                           | ①                           | ①                           |
| ②                                     | ②                           | ②                           | ②                           | ②                           | ②                           | ②                           |
| ③                                     | ③                           | ③                           | ③                           | ③                           | ③                           | ③                           |