

How to create value through branding

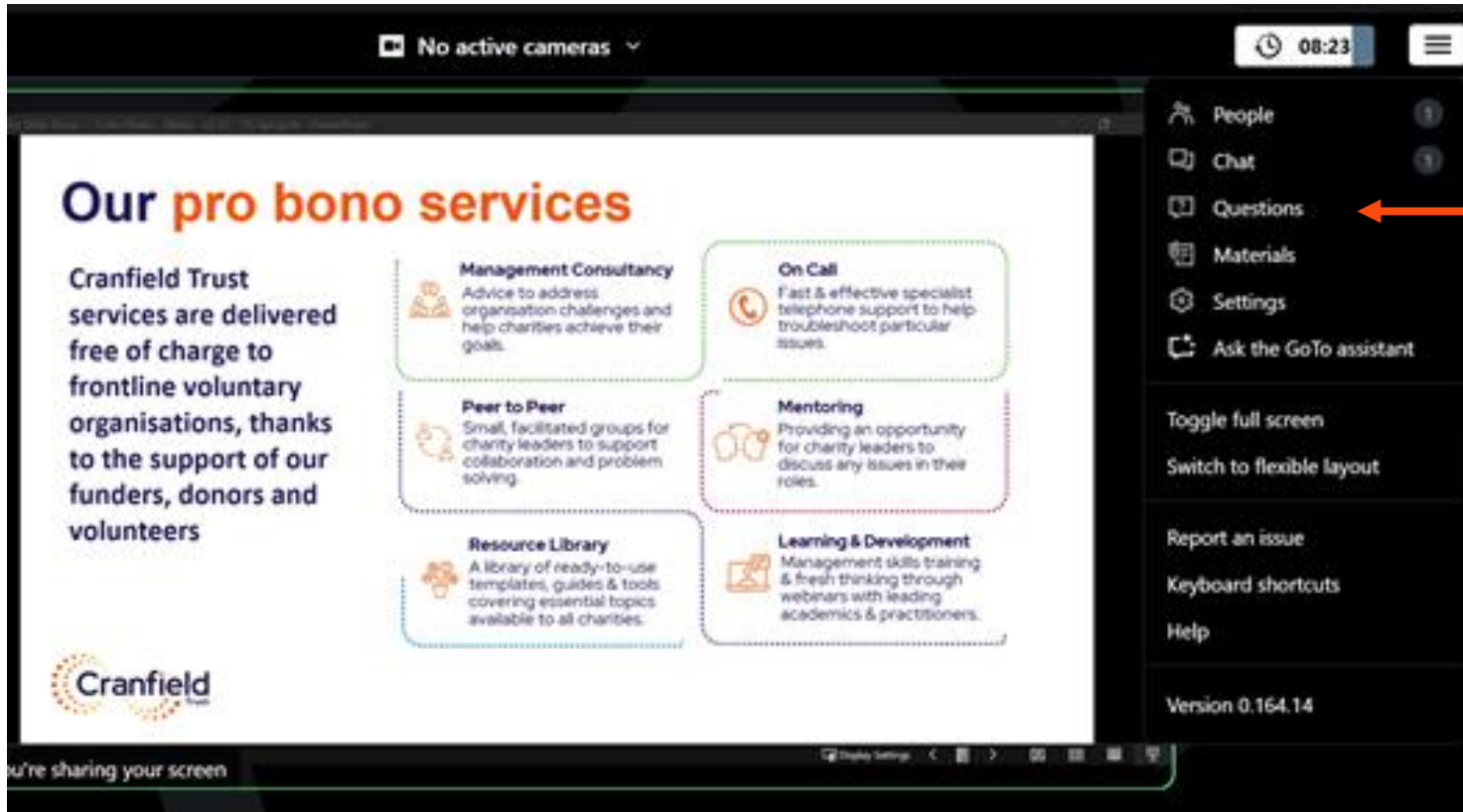


The Learning & Impact Series

Stephen Bates, Brand Affinity
Cranfield Trust Volunteer
10 June 2026

Morgan Stanley

Webinar housekeeping



The screenshot shows a webinar interface. The main slide is titled "Our pro bono services" and lists six services: Management Consultancy, On Call, Peer to Peer, Mentoring, Resource Library, and Learning & Development. The sidebar on the right contains navigation options: People, Chat, Questions, Materials, Settings, and Ask the GoTo assistant. Below these are options to Toggle full screen, Switch to flexible layout, Report an issue, Keyboard shortcuts, Help, and Version 0.164.14. An orange arrow points from the "Questions" option in the sidebar to the text "Please use the question box to ask questions".

No active cameras

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Our pro bono services

Cranfield Trust services are delivered free of charge to frontline voluntary organisations, thanks to the support of our funders, donors and volunteers

Management Consultancy
Advice to address organisation challenges and help charities achieve their goals.

On Call
Fast & effective specialist telephone support to help troubleshoot particular issues.

Peer to Peer
Small, facilitated groups for charity leaders to support collaboration and problem solving.

Mentoring
Providing an opportunity for charity leaders to discuss any issues in their roles.

Resource Library
A library of ready-to-use templates, guides & tools covering essential topics available to all charities.

Learning & Development
Management skills training & fresh thinking through webinars with leading academics & practitioners.

Cranfield Trust

you're sharing your screen

Display Settings

People (9)

Chat (9)

Questions

Materials

Settings

Ask the GoTo assistant

Toggle full screen

Switch to flexible layout

Report an issue

Keyboard shortcuts

Help

Version 0.164.14

• Please use the question box to ask questions

- Everyone is muted during this webinar
- Recording and slides will be shared

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How to create value through branding

—

Stephen Bates

Head of Strategy and Content, Affinity



Today

1. A quick introduction
2. Brand and why it matters
3. How to build a brand that delivers value
 - Discover
 - Define
 - Express
 - Activate
4. Wrap up and quick next steps

1.0

A quick introduction



About me

- 20+ years in marketing, branding and design
- Clients: AXA, Nike, Oracle, Ofsted, South Staffs Water
- Co-led the Affinity team behind the Cranfield Trust brand refresh
- Started in sales, then marketing, now strategy and content
- Different perspective: Believe brand only works when it's lived – in words, experiences and culture



About Affinity

- People first brand consultancy
- Drive growth for business by creating value for people
- Founded to bridge the gap between brand creation and brand experience
- Every team member 20+ years experience with global brands
- SMEs and not-for-profits too



Deloitte.

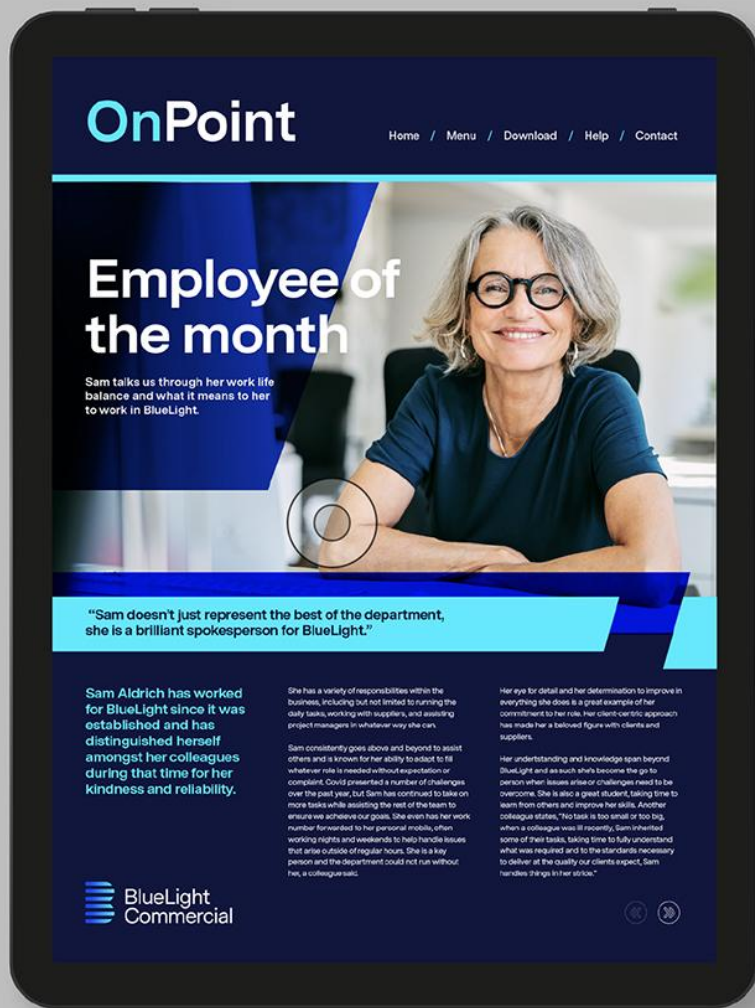


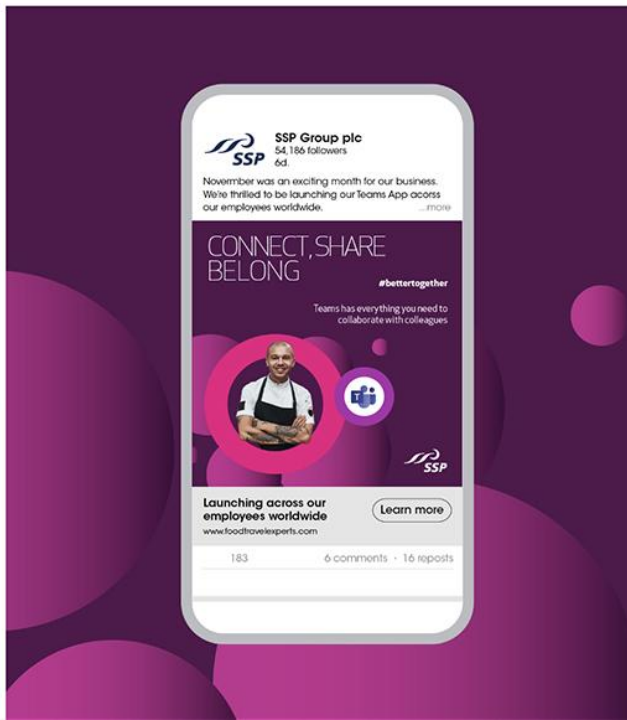
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2.0

Brand and why it matters



What a brand is / isn't

- It's not just visual (logo, colours, fonts and images)
- Overall perception people have of your charity
- Different audiences have different perceptions, but there should be convergence (ref. Nike)
- Shaped by the experiences people have when encountering your charity (touchpoints)
- You don't have 100% control of it – you can only help to shape and direct it



Why it matters for charities

- Recognition + Trust + Belief are crucial in the charity sector (securing donors, talent attraction etc.)
- Brand is a critical tool for scaling recognition, trust and belief (beyond face-to-face communication)
- Without branding, every interaction starts from zero recognition, trust and belief



A small charity survival tool

- Not a luxury or 'nice-to-have'
- Differentiation: Funders are comparing you to dozens of other organisations
- Small budgets: Make advertising ineffective or impossible
- Word-of-mouth reputation building is a powerful/cost-effective channel and brand supports it



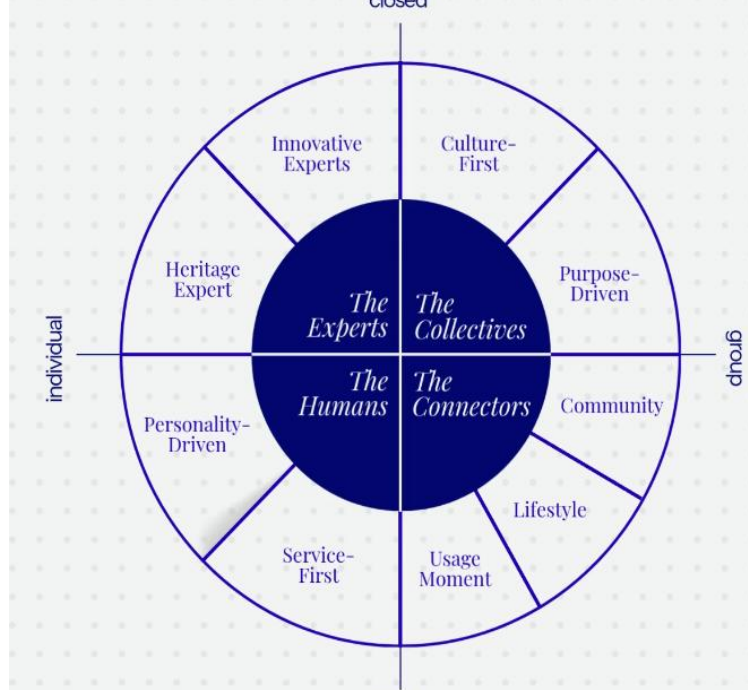
3.0

How to build a brand that delivers value



Key tips

- 100's of frameworks and processes for building brands. Choose one and stick to it
- Brand is a strategic asset, it's not just visual
- Use it to support organisational strategy and objectives (they overlap)
- Be proactive in managing your brand. If you don't, audiences will define it for you
- Consistency builds recognition, trust and value
- Adapting to audiences, channels and external forces is important too



Key tips cont'd

- Engage stakeholders throughout the process
- Establish clear ownership, roles and approval processes
- Test and refine with audiences throughout
- Prioritise activities based on impact, resources and budget
- If budget an issue, segment tasks and projects, plus assign to freelancers



Set success measures

- Before starting any branding project, agree how success will be measured.
- Set time intervals for measuring, e.g. pre and post any brand work, and at 3 to 6-month intervals.

Examples:

- Awareness and recognition
- Trust and reputation
- Audience engagement
- Fundraising performance
- Volunteer recruitment and retention
- Employee engagement
- Service uptake and impact
- Stakeholder perceptions

3.1

Discover

Gather evidence and insights

- Market & cultural context
- Category analysis
- Audience insight
- Brand perception audit
- Services & communications audit



Market & cultural context

What's shaping the environment in which our brand operates?

- Growth and decline areas
- Emerging competitors
- Technology shifts
- Regulatory changes
- Evolving attitudes and behaviours
- Social, economic and cultural influences
- Output – Opportunities and threats



Category analysis

Who are we competing with and where can we differentiate?

- **Competitor landscape**
(key competitors, emerging challengers and market segments)
- **Positioning landscape**
(owned territories, dominant themes and common claims)
- **Customer expectations, trust signals and proof points**
- **Output – White space opportunities**
(underserved audiences, unmet needs and unclaimed territories)

Audience insight

Who are we trying to influence and what matters to them?

- Key audience groups
- Needs and desired outcomes
- Motivations and decision drivers
- Barriers and concerns
- Existing beliefs and perceptions
- Output – Key insights, tensions, unmet needs



Brand perception audit

How are we perceived today and what needs to change?

- Awareness and familiarity
- Brand associations
- Strengths and weaknesses
- Internal and external perceptions
- Trust and reputation drivers
- Output – Perception gaps and opportunities

Services & communications au

What do we do and how clearly is it communicated?

- **Key communications** (website, fundraising materials, etc.)
- **Services, programmes and initiatives**
- **How services, programmes and initiatives are named and organised**
- **Audience needs versus services provided**
- **Distinctive strengths and areas of impact**
- **Clarity and consistency of messaging**
- **Output – Key findings**, including gaps, overlaps and areas of confusion



3.2

Define

Make strategic choices

- Strategic opportunity
- Positioning
- Services & proposition strategy
- Brand platform



Strategic opportunity

Where can we create the greatest impact and differentiation?

- **Market realities that can't be ignored**
(e.g. donor numbers declining)
- **Audience needs and insights**
(e.g. donors are increasingly selective because they feel overwhelmed by the number of charities)
- **Organisational strengths to build on**
(from Brand perception audit and Services audit)
- **Areas of greatest opportunity**
(given the above)
- **Output – Strategic opportunity statement**

Strategic opportunity example

Potential mental health charity

Market reality

Demand for mental health support continues to grow.

Audience insight

Many people seek support only when problems become severe.

Organisational strength

The charity specialises in early intervention and community-based support.

Strategic opportunity statement

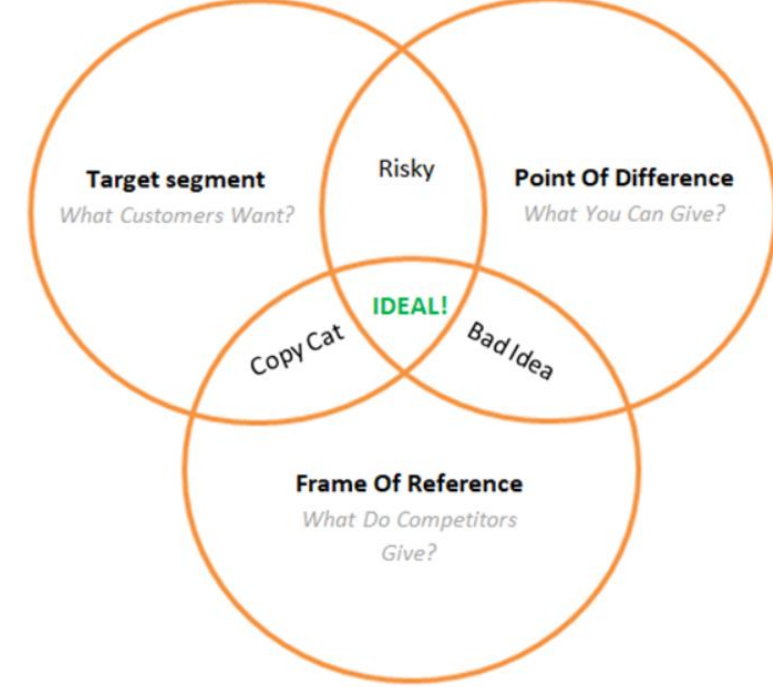
To shift the conversation from crisis response to early intervention by making mental wellbeing support more accessible, relatable and preventative.

Formula: To (create a desired change or impact) by (leveraging a distinctive strength) for (specific audience).

Positioning

What do we want to be known for?

- **Positioning territory / Space we will occupy**
(e.g. preventative mental health support)
- **Key differentiators / Why we're different**
(e.g. Early intervention programmes, Community-based support, Accessible, non-clinical approach)
- **Reasons to believe**
(20 years' experience, 15,000 people supported annually, 90% of participants report improved resilience)
- **Output – Positioning Statement (for internal use)**



Services & proposition strategy

How should we structure and communicate what we do?

- **Service and programme structure/hierarchy**
(e.g. Prevention, Early Support, Recovery, with programmes under each)
- **Service alignment with audience needs**
- **Service naming strategy**
(e.g. Early Support, Community Support, Recovery Support)
- **Proposition development for each service:**
Who is it for? What problem does it solve? What outcome does it create? Why is it valuable?
- **Distinctive strengths and impact**
(e.g. Specialist expertise, Community reach, Proven outcomes)
- **Output: Clear and compelling proposition for every service**

Brand platform

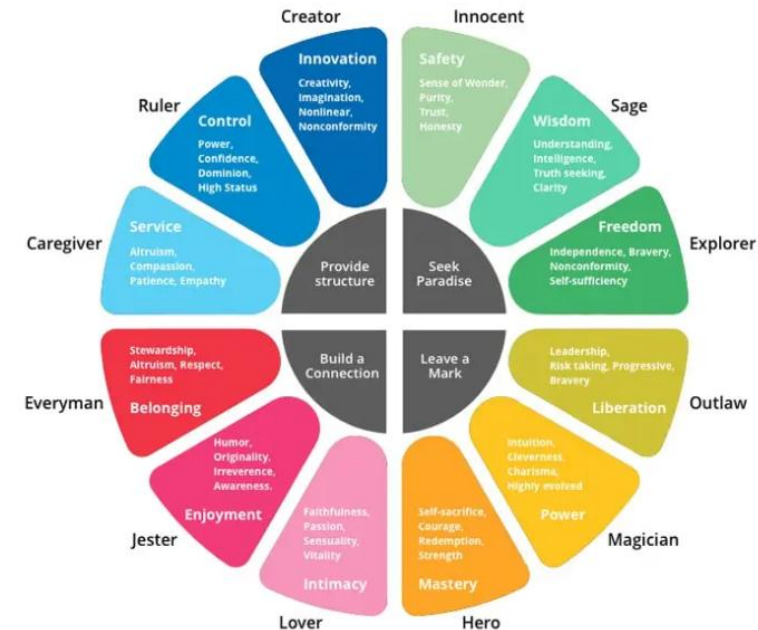
What do we stand for and how do we behave?

- **Purpose – Why we exist**
(e.g. To help people access mental health support before reaching crisis point)
- **Vision – The future we are aspire to create**
(e.g. A world where everyone can access the support they need it before it's too late)
- **Mission – What do we do every day to achieve our vision**
(e.g. To provide accessible early intervention programmes that improve wellbeing and build resilience)
- **Values – What principles guide our decisions and behaviour?**

Brand platform cont'd

What do we stand for and how do we behave?

- **Behaviours** – How our employees, volunteers and trustees should act in line with our values (e.g. Compassion: Seek to understand different perspectives.)
- **Brand personality** – How should the organisation feel? (e.g. Human, Supportive, Optimistic, Practical)
- **Brand principles** – How should we communicate externally? (e.g. Make support feel accessible, Use clear, human language, Lead with evidence and impact)



3.3

Express

Translate strategic choices
into words and design

- Strategic opportunity
- Positioning
- Services & proposition strategy
- Brand platform



Brand narrative

What story are we telling?

- **The challenge or opportunity**
(e.g. "People often seek support only when problems become severe").
- **Why it matters**
(e.g. "Delaying support can worsen outcomes for individuals, families and communities")
- **The change we want to create**
(e.g. "A world where people feel able to access support earlier")
- **The role of the organisation**
(e.g. "We make early intervention support accessible, practical and effective")
- **The role of the audience**
(e.g. "Take positive action early and encourage others to do the same")
- **The outcome we are working towards**
(e.g. "Healthier individuals, stronger communities and fewer people reaching crisis point")
- **Output: Brand narrative framework or statement**

Messaging framework

What are the key things we want people to know, feel and do?

- **Core message**
(e.g. "Nobody should have to reach crisis point before receiving support")
- **Audience-specific messages**
(e.g. "Early support can improve wellbeing and prevent problems escalating")
- **Supporting proof points**
(e.g. "90% of participants report improved resilience")
- **Calls to action**
(e.g. "Access support today")
- **Message hierarchy or prioritisation**
(e.g. Core message → Supporting messages → Calls to action)
- **Key themes to communicate about**
(e.g. Prevention, resilience, impact)
- **Output: Messaging framework**

Verbal identity

How should we write and speak?

- **Tone of voice**
(e.g. Human, supportive and practical)
- **Language principles**
(inc. key terminology and do's and don'ts)
- **Example copy**
- **Output: Verbal identity guidelines**

Tone of voice principles

Do

- Use business-friendly language
- Keep sentences short and to the point
- Be careful when using legal terminology
- Write out acronyms in the first instance
- Be approachable and human e.g. 'If you need help, contact us'
- Use headings and bullet points to break up text.

Don't

- Use long sentences
- Confuse people with jargon
- Overload with facts and figures
- Be patronising or pretentious

Visual identity

How should we look and feel?

- Logo suite
- Colour palette
- Typography
- Approach to imagery
- Graphic devices
- Motion and sonic principles
- **Output: Visual identity system and guidelines**

Apply it CONSISTENTLY everywhere. Humans are visual pattern-recognisers.



3.4

Activate

Bring the brand to life

- External audience experience
- Internal audience experience



Activation considerations

Before you begin applying your brand, review:

- Required time and budget
- Priority audiences and their needs
- Priority touchpoints given budget
- People and process for implementation and sign-offs
- How will you get people committed to it?
- Quick wins and long-term opportunities



External audience experience

How do we create value for external audiences

- Communications strategy and plan
- Website design and content
- Social media strategy
- Fundraising campaigns
- PR and events
- Service delivery
- Supporter experience
- Outcome: Clearer, more consistent and more impactful brand touchpoints



Internal audience experience

How do we create value for external audiences

- Culture strategy
- Leadership development
- Employee lifecycle and experience
- Employee and volunteer engagement campaigns
- Employer brand and comms
- Work environment, tools and resources
- **Outcome:** Energized, productive employees and volunteers who champion the brand and organisation



4.0

To wrap up



What good looks like

- Brand is not a project with an end date. It's a practice.
- The organisations that build the strongest, most valuable brands do three things:
 1. Clear on who they are and why they exist
 2. They say it the same way, every time, everywhere
 3. They deliver on their promise – because reality always beats marketing in the end

Quick next steps

Brand platform

- **Purpose** – Why do we exist beyond the functional?
- **Values** – What do we stand for? What would we never compromise on?
- **Personality** – If we were a person, how would we speak? What would we wear?
- **Promise** – What can every stakeholder reliably expect from us?

Quick next steps cont'd

Tone of voice

- What three words describe how we want to sound? (e.g. warm, expert, direct)
- What would we never say or sound like?
- Does our current writing pass that test?

Quick next steps cont'd

Visual identity

- Create one logo. Colour + Black and white.
Background + Translucent background.
- Pick two or three brand colours. Applied consistently.
- Select one or two fonts. Use everywhere.
- Create a small library of approved images that reflect your work, beneficiaries and values honestly.

Thanks for listening

Reach out if you have questions:

Stephen Bates

Head of Strategy & Content

stephen.bates@brand-affinity.com

0203 859 7699





Thank you to Stephen for delivering such a fantastic webinar!

The recording will be uploaded to the Morgan Stanley Learning & Impact site shortly.

E: TalkToUs@cranfieldtrust.org

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W: cranfieldtrust.org

S: Follow us on LinkedIn for latest news



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- Mentoring programme
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- Cranfield Trust On Call
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