PHASE:3

Strategy Warmup Workshop

A 45-minute conversation to help you identify where your brand is strong, where it needs work, and whether it's time for a deeper strategic tune-up.





Welcome to Your Strategy Warmup Workshop

We've pulled together four of the most eye-opening, discussion-generating exercises our strategists use to help clients uncover blind spots, challenge assumptions, and identify opportunities to strengthen their brand strategy —and packaged them into a workshop your team can tackle together.

Strategy Warmup Workshop won't deliver a shiny, ready-made brand strategy – that's **Brand Strategy Boot Camp** territory. What it will do is get you and your team thinking, talking, and untangling where your strategy is holding its own, and where it might be holding your business back.

If it's a little hard, or if you stir up some friendly tension – that's the good stuff. Write it down, keep thinking, and give us a call if you'd like some objective expertise shaping your insights into a strategy that can shape and tone your marketing (and your business).

Here's to a productive session!

Cheers,

YOUR PHASE 3 STRATEGY COACHES



AMANDA O'BRIEN,
SVP, STRATEGY



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DIRECTOR, STRATEGY

01 Invite 3-4 Team Members to Participate with You

Gather people involved in your marketing, your brand direction, your sales. You want to hear from the people who chart your course and help your business touch the outside world.

02 Choose a Way to Capture Your Chatter

Write it all down: where you disagree, where you align, what truths bubble to the surface. It's fine to use AI to transcribe or summarize as a backup, but we recommend having a human note-taker take the lead so the nuances don't get lost. An "aha" to you might read as a "ho-hum" to AI, and the "ahas" are why you're here.

03 Schedule 45 Uninterrupted Minutes to Work

If you're like most teams, you'll want to start tackling issues and making plans on the spot. Don't. Remember, we're just stretching here – good insights need to breathe a little. You're here to find gaps, not fix them.

04 Use the Reflection Questions at the End to Plan Your Next Steps

Talk about why this was difficult or easy, and get some suggestions on where to go from here.

Let's Begin

Strategy Warmup Workshop

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TODAY'S GAME PLAN

We'll work through a series of quick exercises to examine our brand strategy and uncover areas worth exploring.

We'll spend about 10 minutes in each area:

01

Our Audience

Whiteboard/ digital brainstorm exercise

02

Our Elevator pitch

Think-then-share exercise

03

Our Positioning

Whiteboard/ digital brainstorm exercise

04

Our Difference

Think-then-share exercise

And then we'll do a short reflection to see what we've learned.

Let’s Get the Most Out of this Workshop.

Stay curious, answer honestly.
The goal isn’t to find right answers—it’s to discover what we might be missing.

Disagreement is good.
If our answers don’t match, that points us toward something worth exploring.

Capture ideas, keep moving.
If a discussion gets bigger than the exercise, we’ll make a note of it and come back to it later.

Trust the process.
By the end, we’ll have a clearer picture of where we’re aligned, where we’re making assumptions, and where it may be worth digging deeper.

Our Audience

Whiteboard/ digital brainstorm



OUR AUDIENCE

Who are we talking to?

Let's dig into your target audience. Before we can get into their heads, we need to know who they are.

The Decision Maker

This is the person who ultimately says yes, signs the contract, or pushes that BUY button.

Who is this person?

The Decision Influencer

This is the person who convinces the decision maker to believe in your product or service.

Who is this person?

The End User

This is the person who ultimately uses your product or service regularly.

Who is this person?



OUR AUDIENCE

Who are we talking to? And what do they want from us?

Now let's talk about their motivations. For each target you've noted, answer the following three questions:

The Decision Maker

This is the person who ultimately says yes, signs the contract, or pushes that BUY button.

The Decision Influencer

This is the person who convinces the decision maker to believe in your product or service.

The End User

This is the person who ultimately uses your product or service regularly.

- **What are they trying to accomplish?**
- **What problem do they hope your product/ service will solve?**
- **What is their ideal outcome?**
  What would feel like a big win to them?

What to look for: Notice which audiences and motivations feel like a no-brainer, and which feel less clear.

Our Elevator Pitch

Think-then-share exercise

OUR ELEVATOR PITCH

The Elevator Pitch Test

Can your company tell the same story every time?

THINK-THEN-SHARE EXERCISE

Round 1

Set a timer for **3 minutes**.

Without collaborating, write **4 sentences** to describe what your company does.

Round 2

Set a timer for **1 minute**.

Without collaborating, write **1 sentence** to describe what your company does.

Round 3

Read your elevator pitches out loud.

What to look for: Notice where answers overlap or differ; notice common language.

Our Positioning

Whiteboard/ digital brainstorm

WHITEBOARD BRAINSTORM

Positioning Reality Check

Do you know how your customers perceive you in the market?

Brainstorm for a few minutes around each question. Go one question at a time, moving on as a group. Document your answers (even the “I don’t know if this is anything…” answers).

What do our customers and prospects believe about us now?

What do we want them to believe?

What’s standing in the way of them believing that?

What to look for: Notice where answers overlap or differ.

Our Difference

Think-then-share exercise

OUR DIFFERENCE

Differentiation Test

What sets your business apart from the rest?

THINK-THEN-SHARE EXERCISE

First: Without collaborating, complete this sentence as many times as you can.

Customers choose us because _____ .

(It's fine to list more than one reason)

Next: Read your answers out loud.

What to look for: For each answer, consider: could your direct competitor say the same thing?

Reflection

Let's see what we've learned

Which statements felt true today?

- ☐ Our audience is more complex than we thought
- ☐ It was a challenge to explain what we do clearly and/ or consistently
- ☐ We want to shift or update the way they our customers see us in the market
- ☐ Our answers were pretty different in one or more exercises
- ☐ We found ourselves debating terminology
- ☐ It felt like we were describing any business, not our business
- ☐ Sales, marketing, and leadership don’t have a consistent story to tell
- ☐ None of these—this was a breeze, and we felt aligned throughout



Ready for the Next Step?

If today's workshop opened a few doors, sparked healthy debate, or exposed some weak spots, that's a sign you've got something worth exploring. The challenge is that it's hard to see your own blind spots when you're living inside the brand every day. That's where **Brand Strategy Boot Camp** comes in.

In just 7 days, our strategists will help you take an objective look at what you're working with. We'll dig deeper into what you did today, zoom in on insights, and shape up a clear, aligned brand strategy that gives you and your team everything you need to move forward with a stronger marketing foundation. **Like a personal trainer for your brand.**

You've already started.
This Warmup Workshop is a version of the pre-session work our Brand Boot Camp clients complete – so you've already completed step one.

Creating a strong strategy doesn't have to be complex or expensive. *But it does have to be done.*

CHECK OUT BRAND STRATEGY BOOT CAMP HERE >

Who Made This?

We're Phase 3, a full-service marketing agency with the powerhouse capabilities to take your brand from ideation to execution (and every step in between).

When it comes to brand strategy, our strategists know what to look for, what questions to ask, and how to separate symptoms from the real issues—so you can stop overworking your marketing and train the key brand muscles that will transform your brand—and your business—for good.

GET TO KNOW US >

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