

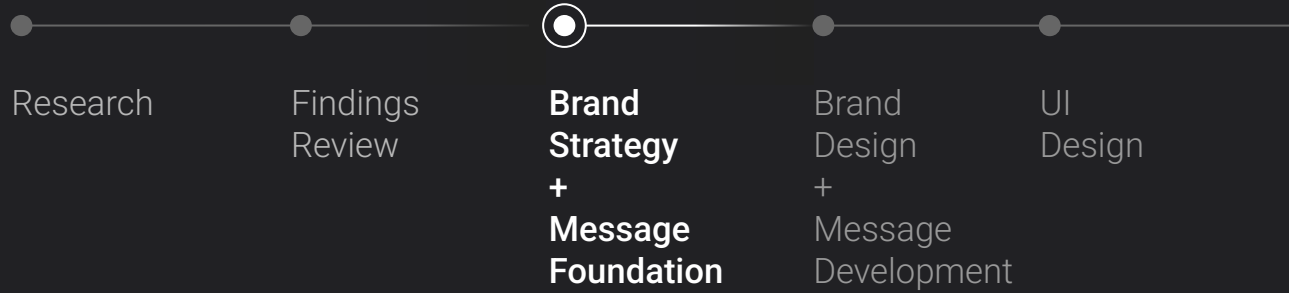
Rootworks

Brand Strategy Framework

Message Foundation

FEBRUARY 6, 2019 (Revised February 12)

Project progress



Objectives of this phase

Using the insights from research on the market landscape (company, competitive, and audience perspectives), develop and deliver:

Brand strategy and message foundation

- Unifying theme to form basis of a compelling brand story
- Brand position
- Value propositions
- Internal brand positioning statement

Contents

Positioning context	5
Brand strategy framework	11
Next steps	21

Positioning Context

Recommendations and key information from the research findings report that establish the basis for the brand strategy framework

Positioning context

Rootworks' position and messages should reflect the level of engagement prospective and future clients can expect to receive from you.

Positioning context

Rootworks' position and messages should speak to achievable, relatable changes and growth for those who are not entirely prepared to transform their businesses.

Positioning context

Rootworks' position and messages should ensure customers they will be engaged, and not merely advised—and that goals are achievable.

Rootworks benefits

Customer Pains	Rootworks Solutions	What Customers Receive
Finding the right staff	• Coaching • Weekly staff training	• Advice and tools for attracting the right staff for you, guiding staff around your business model
Not having the right knowledge, experience	• Firm assessment tools • Coaching • Advice on tech solutions • Resource library • Annual workshop • Peer community/network • Website, marketing materials	• A state of their current businesses; a starting point • Tools, documents for unfamiliar situations and tasks • Motivation and processes from those who have “made the leap” • A way to present yourself, your value to clients
Speed of change in the accounting world	• Coaching • Advice on tech solutions • Annual workshop • Peer community/network	• Solutions that are tested by Root Advisors, and accountants like you
Having to run a tax business first	• Coaching • Peer community/network	• Motivation, advice to take the next step

Points of differentiation

Rootworks is

- A people company
- Demonstrating value; quantifying success
- Knowledgeable about the best product for you
- Engaging; walking the path with you
- Defining the next level with you
- Achievable goals

Thomson Reuters is

- A software company
- Cashing the check
- Knowledgeable about Thomson Reuters
- Passive; sketching out the path for you
- Interested in taking you to some “next level”
- Lofty goals

Brand Strategy Framework

Unifying theme to form the basis of a compelling brand story

Brand position

Value propositions

Brand positioning statement

Unifying Theme

A compelling brand story; serves as the basis for the strategy elements below

Brand Position

Defines what Rootworks is

Value Proposition 1

Describes the value of Rootworks offerings

Value Proposition 2

Value Proposition 3

Value Proposition 4

Brand Positioning Statement

Captures all brand strategy elements in a single, internal statement

Unifying theme

Guided growth and development

Our clients want a better way. They just don't know what to do. That's where we come in. We do more than just show the path, we walk it with people.

Because we are built with the first-hand knowledge of a working firm, our solutions are achievable. One step at a time, small firms will see a difference:

“This year was better.”

Brand position

**Rootworks is the Performance Platform
for the Modern Firm.**

Implications

**We'll have to reframe
the current use of the
word "platform."**

Hurry, register for the Virtual Modern Firm Webinar!

Register Now

rootworks

MembershipAboutSuccess StoriesPodcast

Log InSCHEDULE A TOUR

Platforms that power the Modern Firm

Offer your clients a modern online place to do business with you while supporting a strong brand presence.

Your website is at the heart of your brand, so we make sure you look fantastic! Our websites provide members with a modern and scalable "place to do business" via our premier Client Center while also ensuring your professional brand presence. A Rootworks website provides you with a:

- Robust platform to support clients with a modern online experience.
- High-end marketing and branding tool to properly communicate who you are and what you do clearly, beautifully and professionally.
- Powerful sales tool that you'll be proud to drive prospects back to.

Interested? Schedule a Tour!

Please fill out the form below and we will reach out to you.

First Name

Last Name

Email

Company



15

Value propositions

**Solutions That Fit
Resources That Equip
Answers That Resonate
People Who Support**

Value propositions

Solutions That Fit

What you get

What's next in accounting technology

Winning, best-of-breed solutions that the Modern Firms provides

What it does

Gives you the right tools for your situation

Why that's valuable

You'll build the business you want to build, in the best possible way.

Value propositions

Resources That Equip

What you get

An online library of tips and tools, for both common and unique situations
Weekly staff training sessions

What it does

Prepares you to take on unfamiliar tasks, when you want, without reinventing the wheel
Aligns your staff with best practices for the modern firm

Why that's valuable

You'll build the business you want to build, in the best possible way.

Value propositions

Answers That Resonate

What you get

The expert knowledge of a real firm, one-on-one coaching, and educational events

What it does

Provides you with tested processes from the people who invented the modern firm

Why that's valuable

You'll take steps toward growth that are realistic and achievable.

Value propositions

People Who Support

What you get

Guided growth and development with a personal coach, the first-hand knowledge of a working firm, and a community of peers who are on the same journey

What it does

Connects you with people who understand and inspire, guiding you to better performance
Engages you when you need help—and even when you might not know you need it

Why that's valuable

You'll be more than just informed or equipped—you'll have a team to move you toward building a firm that works for you.

Internal brand positioning statement

For accountants seeking guided growth and development, Rootworks is the performance platform for the modern firm, providing solutions that fit, resources that equip, advice that resonates, and people who support—unlike unrealistic solutions that offer no follow-through or follow-up.

For (target customers) who are dissatisfied with (the status quo problem), our Business is the (uniquely differentiated solution) that provides (key problem-solving capability / opportunity-making capability) unlike (the status quo solution).