CREATIVE SPARK

BOARDROOM TOOL GUIDE

How to use the brand investment boardroom tool

A practical guide for preparing and running the discussion



The tool helps a leadership team decide whether to continue as it is, make a targeted change, invest in brand strategy and identity, or gather better evidence first. It keeps the conversation on a live business decision and tests the cost of standing still against the full cost of acting.

USE THE FIRST FIVE SLIDES AS A WORKING SESSION

Slides 1–5 are blank prompts to complete with the team. Slides 6–7 are a fictional worked example. Do not copy its figures into a real business case; use them to see how evidence, assumptions, costs and a payback test fit together.

What the discussion should produce

By the end, the group should have one clearly stated decision, a customer or stakeholder signal, an estimate of the cost of inaction, a fair comparison of the available routes, and a next step with an owner and review date. The meeting does not have to end with approval for a brand project. It should end with a better-supported decision.

Before the meeting

Choose one decision that is actually on the table. Avoid starting with a general question such as “Do we need a stronger brand?” Be specific: for example, whether to enter a market, change the offer, raise prices, bring several offers together, or reposition the business.

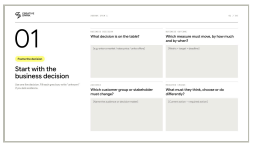
- Invite the person who owns the decision, someone close to customers or sales, and someone who can check the commercial assumptions. Include Finance when contribution, margin or project costs are being discussed.
- Bring the latest 12 months of relevant CRM, proposal, win/loss, discount or customer evidence. Bring the source and date, not just a summary of what people remember.
- Agree the project scope and cost range being considered. For a Creative Spark brand strategy and identity project, use £30,000–£45,000 as the typical fee range; add rollout and implementation costs separately.
- If the team lacks a baseline or reliable evidence, write “unknown” and record how to find out. Do not fill gaps with a guess and then treat it as a fact.

A suggested 60-minute session

TIME	WHAT TO DO
0–10 minutes	Frame the business decision, the outcome to change and the audience whose behaviour needs to change.
10–25 minutes	Review the customer signal. Separate what was observed from what was reported or assumed.
25–40 minutes	Estimate the cost of the current situation over 12 months. Use contribution, time or another suitable proxy.
40–55 minutes	Compare continuing, a targeted fix and a brand project on the same time horizon and include rollout costs.
55–60 minutes	Record the route, the reason, the next action, its owner and the review date.

How to complete each slide

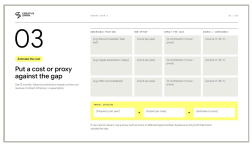
Work through the slides in order. Keep each answer short enough to fit in the box, but specific enough that someone who was not in the room can understand what the team decided.



01 FRAME THE DECISION



02 EVIDENCE THE GAP



03 ESTIMATE THE COST



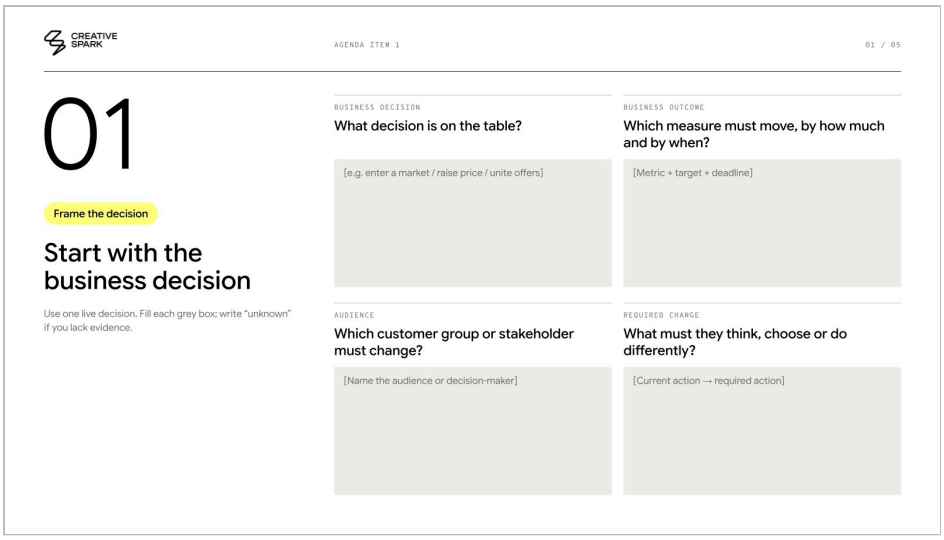
04 COMPARE AND DECIDE



05 RECORD THE CALL

01

Frame the decision



Start with the business decision. Do not begin by assuming that brand is the answer.

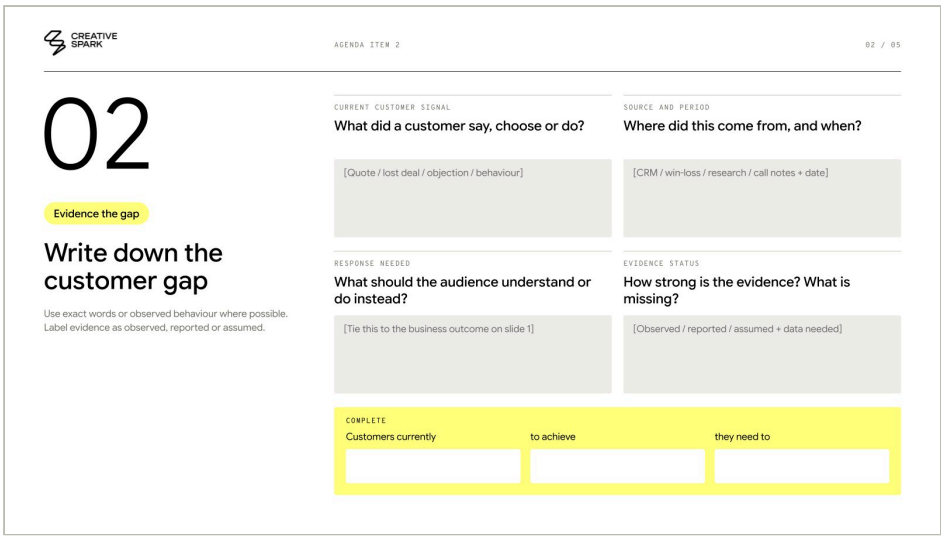
BOX	WHAT TO ENTER
Business decision	Write the choice the leadership team must make, and when it needs to make it. Name the market, offer, price or change involved. Example: “Should we invest in making our move to full-system supply clear?”
Business outcome	Name the measure that matters, its current baseline, the target and the period. Prefer contribution, qualified opportunities, conversion or another commercial measure over a broad aim such as awareness. If you do not know the baseline, write that it is unknown.
Audience	Name the customer group or decision-maker whose choice or behaviour needs to change. Avoid “everyone” unless the decision genuinely affects every audience.
Required change	Describe the shift from current to required behaviour in plain language. For example: “from seeing us as a component supplier to considering us for design, installation and support.”

CHECK BEFORE MOVING ON

Can the team say what decision it is making, what outcome should move, and whose behaviour needs to change? If not, agree what needs clarifying first.

02

Evidence the gap



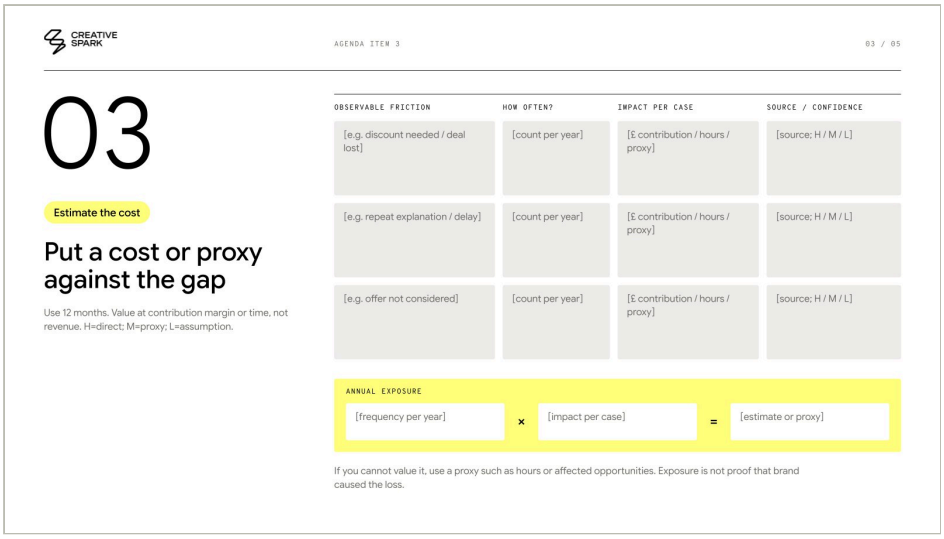
Show what customers or stakeholders currently experience and what they need to understand, choose or do instead.

BOX	WHAT TO ENTER
Current customer signal	Enter a specific quote, action, objection, lost deal, delay, discount or other behaviour. Give enough context to explain what happened. Do not write only “customers are confused”.
Source and period	Name the source and date range: for example, CRM lost-deal notes, research interviews, call notes or proposal reviews, covering a stated period.
Response needed	State what the audience should understand, believe, choose or do instead. Link it back to the outcome on slide 1.
Evidence status	Label the signal as observed, reported or assumed. Say what is missing: for example, buyer confirmation, a larger sample, an agreed baseline or a Finance check.

Complete the sentence at the bottom of the slide using one current customer reality, the business outcome and the change needed. If you cannot complete it without guessing, make the missing evidence the next action.

03

Estimate the cost



Estimate the annual exposure created by the observable friction. Use a consistent 12-month period.

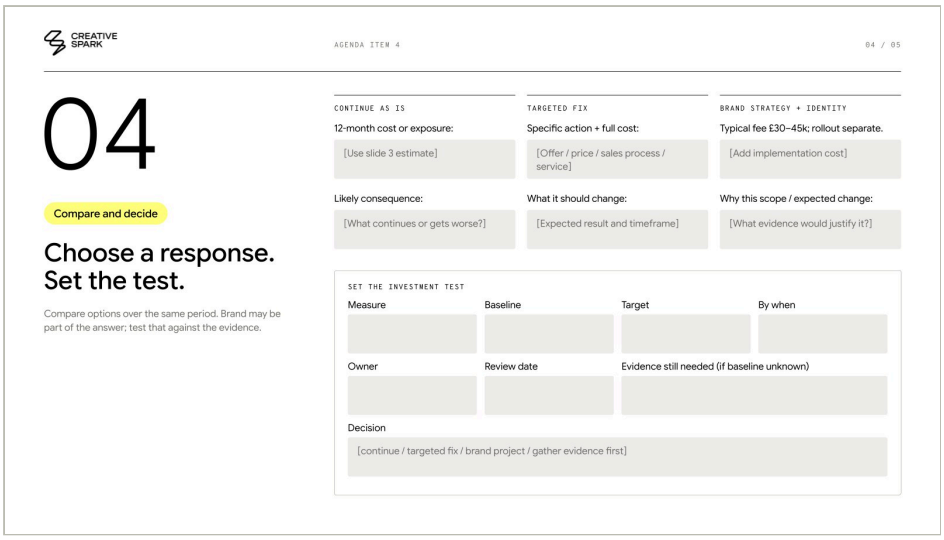
COLUMN	WHAT TO ENTER
Observable friction	Name one specific issue per row, such as a discount needed to overcome confusion, a lost opportunity, repeat explanation, a delayed decision or an offer not considered.
How often?	Count how often it happened in the period. Use a count the team can trace to a source, such as six documented cases in the last 12 months.
Impact per case	Use contribution margin, staff time or another relevant cost. Do not use revenue as if it were profit. If you use a proxy, state what the proxy is.
Source / confidence	Name the record or person who supports the figure and rate confidence as high, medium or low. Record any assumption alongside the number.

CALCULATION

Annual exposure = frequency in 12 months × impact per case. Add rows only when they describe separate effects; avoid counting the same lost opportunity twice. The result shows potential exposure, not proof that brand caused the loss or that all of it can be recovered.

04

Compare and decide



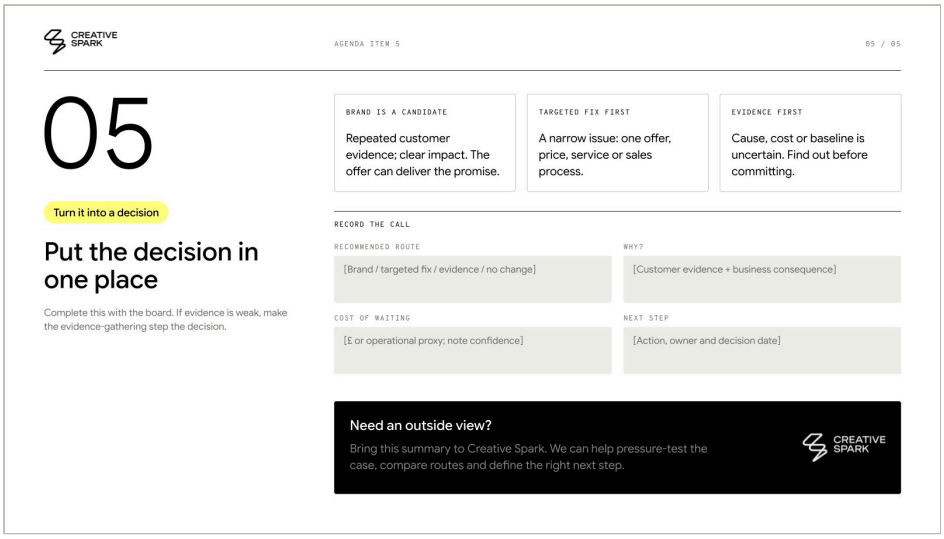
Compare each route over the same period and include the full cost of acting.

ROUTE	WHAT TO ENTER
Continue as is	Record the cost of the current approach and the likely consequence if it carries on. Use the slide 3 estimate where relevant. Do not imply that spending nothing has no cost.
Targeted fix	Describe a specific, narrower action, such as clarifying one offer, improving proposal evidence, adjusting pricing or changing a sales process. Add its estimated cost and what it should change.
Brand strategy + identity	State why the issue appears broader than one executional fix. Include the Creative Spark strategy and identity fee of £30,000–£45,000, plus separate rollout and internal implementation costs. Say what evidence would justify this scope.

Then complete the investment test: choose a measure, record the baseline, set a target and date, name an owner and agree when the team will review progress. If the baseline is missing, the sensible decision may be to gather it before committing the full investment.

05

Record the call



Make the decision and its reasoning clear enough to act on after the meeting.

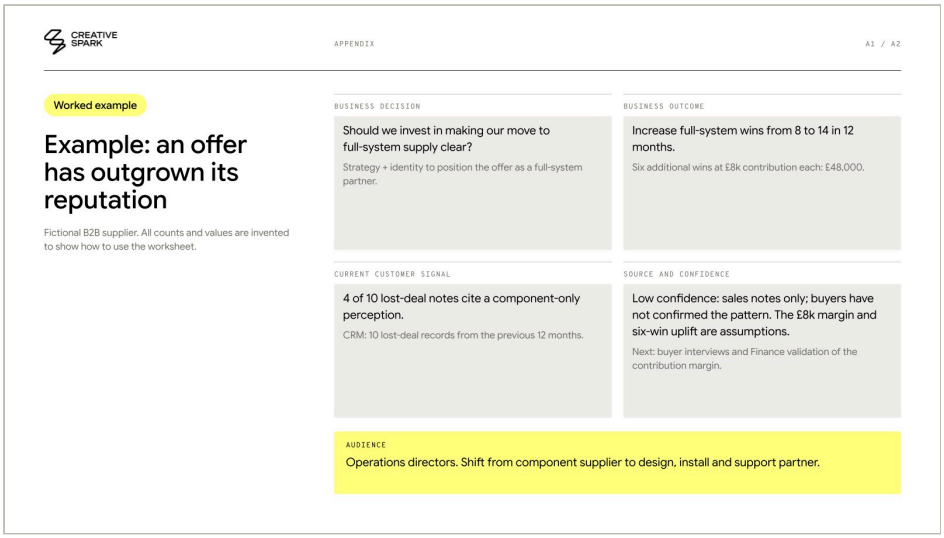
ROUTE OR BOX	HOW TO USE IT
Brand is a candidate	Use this route when evidence points to a repeated, wider positioning or identity problem, there is a visible business consequence, and the business can deliver the promise it wants to make.
Targeted fix first	Use this route when the problem is narrow and can be addressed in one offer, price, sales process or service.
Evidence first	Use this route when the cause, scale, baseline or likely impact is still uncertain. State exactly what to learn, who will do it and by when.
Record the call	Write the chosen route, why it fits the evidence, the cost of waiting, the next action, its owner and the decision or review date.

The final Creative Spark invitation is optional. It gives the team a way to pressure-test the case or compare routes; it does not mean that every situation should lead to a brand project.

How to read the worked example

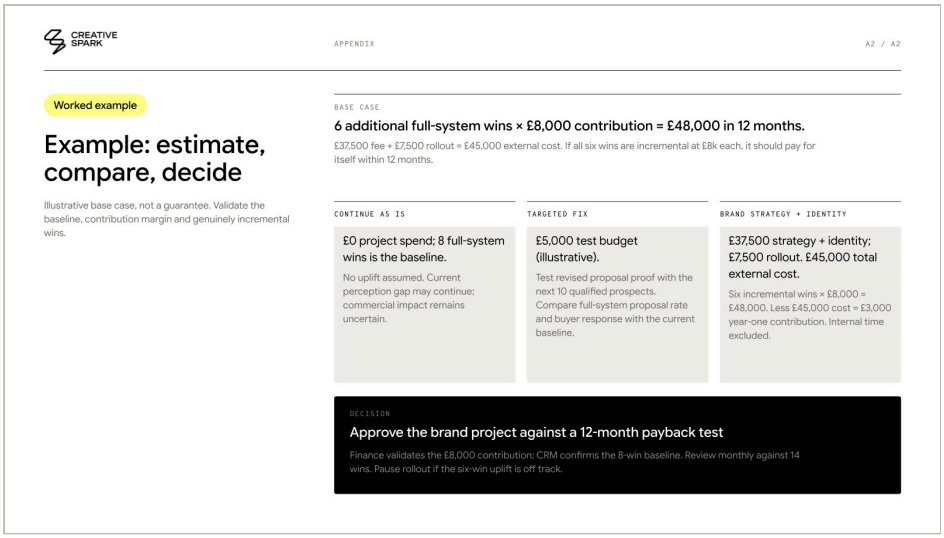
Slides 6–7 show one fictional B2B supplier. Every count, margin and cost in the example is an assumption, not a benchmark or a promised outcome. Its purpose is to show how to connect a customer signal to a commercial decision and a measurable payback test.

Slide 6: the starting case



- The decision is whether to invest in making the move to full-system supply clear. The strategy and identity work would position the offer as a design, installation and support partner.
- The baseline is eight full-system wins in the previous 12 months. The example sets a target of 14 in the next 12 months, which means six additional wins.
- Four of ten lost-deal notes mention a component-only perception. This is a sales-recorded signal, not buyer-confirmed proof that brand caused the losses.
- The example marks confidence as low and calls for buyer interviews and Finance validation. The £8,000 contribution per win and the six-win uplift must be checked before treating the forecast as a business case.

Slide 7: the payback case



The example uses a £37,500 strategy and identity fee plus £7,500 for rollout, making £45,000 in external costs. Six additional wins at £8,000 contribution each would produce £48,000 in the first 12 months. That leaves £3,000 after external project and rollout costs, before internal time. On those assumptions, the project should pay for itself within 12 months.

WHAT THE PAYBACK STATEMENT DEPENDS ON

All six wins must be genuinely additional to the eight-win baseline, the £8,000 contribution must be verified, and rollout must stay within the £7,500 estimate. The annualised calculation implies payback at about 11 months, but the actual date depends on when wins are secured. If internal time or extra rollout costs are material, include them in the investment total and recalculate.

The break-even point is £45,000 ÷ £8,000 = 5.625 additional wins. Because partial wins are not possible, the base case needs at least six additional wins to recover the external cost within the year. Five wins would generate £40,000 contribution and leave a £5,000 gap before internal time.

How to use the three comparisons

ROUTE	INTERPRETATION
Continue as is	No project spend is assumed, and the current eight-win baseline continues. The example does not assume an uplift or claim that the whole £48,000 is currently being lost.
Targeted fix	A £5,000 test budget is assumed for revising sales proof and testing it with the next ten qualified prospects. Compare proposal rate and buyer response with the current baseline before deciding whether broader work is justified.
Brand strategy + identity	The £45,000 external cost is compared with the £48,000 base-case incremental contribution. The expected £3,000 surplus is small, so the baseline, contribution and rollout assumptions matter.

Turning the example into a live decision

01 Replace every illustrative figure with evidence from the business. Use the actual win baseline, project scope, fee, rollout estimate and contribution margin.

02 Check that the customer signal and the proposed change are connected. Interview buyers or review enough evidence to understand why the current offer is not being considered.

03 Agree what counts as an incremental win and how it will be recorded. Compare progress with the baseline monthly, alongside proposal rate and buyer response.

04 Recalculate payback using the full external cost and any material internal time. Keep the decision conditional on the assumptions that make the payback work.

05 Set a review date and an action if progress is off track. In the worked example, rollout is paused if the six-win uplift is not on track.

THE STANDARD TO AIM FOR

A useful boardroom discussion does not need perfect evidence. It does need a clear distinction between what the team knows, what it assumes, what the proposed investment costs, and what would have to change for the project to pay for itself.