



Personality Worksheet

Client Name: Make Taxes Fair

Date:

Step 0: Review your Audience Avatar Worksheet

What are your ideal client/customer's desires?

Clarity
Specific next steps.
Confidence in their direction and resolution.

What are your ideal customer's fears?

Taxes being wrong/Fear of being audited
Not knowing how much might owe at tax time
Not knowing if they have funds to pay tax bill

What emotions are they experiencing before they work with you?

Stress & Worry
Uncertainty
Burnout

What emotions do they experience after they work with you?

Relief
Clarity

Confidence

They feel like they are in control.

Step 1: Find Your Customer's Archetype

We're going to write a story. In this story, your customer is the main character. The first thing to do is to determine who you are in relation to your customer. Good storytelling is all about patterns, and in most good storytelling, the characters can be easily divisioned into one of 12 basic archetypes. We need to find which archetype best fits your brand, and your customers.

Review this graphic developed by renowned brand strategist, Steve Houraghan:

<https://ducimus.digital/wp-content/uploads/2020/11/BrandStrategy-Worksheet-9-ArchetypesFrameworkCheatSheet-1.pdf>

Which of these archetypes best aligns with your customers' values and desires?

Ruler with Hero Undertones

Step 2: Find Your Brand's Archetype

Which of these archetypes best aligns with your values and desires?

Everyman Brand with Sage Undertones. We have a big focus on being friendly and encouraging/empowering. We're also big on sharing knowledge and being extremely knowledgeable about our domain.

What are your customers looking for in someone who can solve their current problem/situation for them?

- 1) A Guide
- 2) An Inspiration
- 3) A Leader
- 4) A Peer
- 5) A Defender

Which of these messages is most likely to appeal to your ideal customer?

- 1) I can guide you
- 2) You can be me
- 3) You can be great
- 4) We are the Same



5) I can protect you

Step 3: Describe Your Brand's Voice

Will your brand be more formal or casual? (Scale of 1-10)

3 - professional with a sprinkle of punny

Will your brand be more straightforward or tactful? (Scale of 1-10)

7 - we will tell you that you're wrong, but we're going to give you a lot of context around our answer and help you understand

Will your brand be more gritty and rough or articulate and refined? (Scale of 1-10)

10 - Very refined in our language and presentation

Will your brand be more factual or sensory? (Scale of 1-10)

6 - we'll always share numbers and figures, but we'll leverage stories and real life experiences to hold in their memory.