

Brand Story

Client Name:

Date:

This worksheet has been developed based on Donald Miller's "Building A Story Brand" and the SB7 framework described inside of the book.

A Character

Your customer is the hero of your story. What do they want as it relates to your product or service?

Clarity and confidence around taxes. They want to keep more of their own money without breaking rules or getting in trouble.

Has a Problem

VILLAIN

Is there a root cause of your customers' problems? Can you personify this root cause as a villain? What is the villain in your customer's story?

The government. The overly complicated tax code. Themselves.

EXTERNAL

What is a problem your customers deal with as it relates to your product or service?

They are overpaying on taxes. High tax bill. Spending way too much time and energy on taxes.

INTERNAL

How is this villain making your customers feel?

They are worried and uncertain. They lack clarity. Emotionally drained.

PHILOSOPHICAL

Why is it "just plain wrong" for your customers to be burdened by this problem?

They deserve better than what a happy historian can offer. There are rules to the game and you are overpaying simply because nobody told them to you.

And Meets a Guide

EMPATHY

What brief statement can you make that expresses empathy and understanding?

Friends don't let friends overpay the government.

"We are entrepreneurs, we build our own economy, we are in the trenches with you"

"We spent years as professional tax payers before we became tax professionals"

AUTHORITY

How can you demonstrate competency in solving your customer's problem?

We've done this for years and saved our clients tens of millions of dollars on taxes

Who Gives Them a Plan

PROCESS

Are there 3 or 4 steps your customers can take that would lead them to a sale or explain how they would use your product after the sale?

- Schedule Discovery Call with Make Taxes Fair
- Gather and organize records
- Let us create a Tax Strategy Roadmap for you
- Follow the roadmap we give you using actionable and detailed checklists and tools
- Maintain and regularly attack your tax bill by paying attention to the strategies that you have and let us continually find new strategies for you.

AGREEMENT

List the agreements you can make with your customers to alleviate their fears of doing business with you.

We guarantee that we'll find you at least 5x the cost of your roadmap in savings or we'll give you a refund.

And Calls Them to Action

DIRECT

What is your direct call to action?

Schedule a Call

TRANSITIONAL

What transitional calls to action will you use to on-ramp customers?

Join our Free Community -> Join our Paid community
Download our [checklist from resource center]

That ends in a Success

List the positive changes your customers will experience if they use your product or service.

They will feel clarity,
They will keep more of their own money.
They will have confidence, and specific next steps to follow (clear direction).

That Helps them Avoid Failure

List the negative consequences your customers will experience if they don't use your product or service.

Overpaying on taxes.
Never able to make the investments they know would help their business (key hires, employee training, new equipment, etc)
They can't keep up with their dreams.

Character Transformation

FROM

How was your customer feeling about themselves before they used your product or service?

Worried and stressed about taxes.

TO

Who will your customer become after they use your product or service? What is their aspirational identity?

They have clarity, understanding, and confidence. They feel like they are in control.