

# BRAND GUIDE AND CHECKLIST

So what's ON-BRAND? Use this Brand Guide and Checklist to assess your marketing and communication materials.

## Here's how you can build the brand promise

You've heard about our brand promise, *Action powered by insight*, and want to start using it right away.

Before you start writing about our brand, keep in mind:

- *Action powered by insight* is an **internal** statement, not an external-facing message
- We must deliver our brand promise at various touchpoints with customers and partners before we share it externally.

## Here's what YOU can do to help to establish our brand.

Use the Brand Guide and Checklist while preparing your marketing and communication materials.

Writing consistently in the Sun Life voice helps build our brand, one interaction at a time.

## More information?

For more on our brand promise and identity, visit Brand Share.

## Action

ON-BRAND marketing and communications :

- ☐ Make the reader think
- ☐ Simplifies
- ☐ Validate a feeling
- ☐ Make people feel good
- ☐ Encourage action
- ☐ Create action

## Empowerment

ON-BRAND efforts:

- ☐ Help inform
- ☐ Reduce barriers (emotional or practical)
- ☐ Are clear and straightforward
- ☐ Are optimistic and helpful
- ☐ Allow the reader to take the next step on his or her own terms

## Insight

ON-BRAND marketing and communications make the reader feel:

- ☐ "Wow, this company really gets me."
- ☐ "That is exactly right!"
- ☐ "That's exactly what I needed!"
- ☐ "This is about ME."

## Tone and personality

ON-BRAND marketing and communications should be:

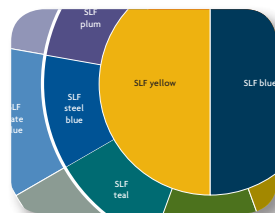
- ☐ Insightful
- ☐ Empathetic
- ☐ Answer-driven
- ☐ Inventive
- ☐ Candid
- ☐ Future-oriented
- ☐ Human
- ☐ Warm
- ☐ Helpful
- ☐ Approachable

Use this checklist during your review and decision-making to ensure your marketing and communications are ON-BRAND. The more points you check off, the more your work is ON-BRAND.

## Our visual identity | These four key elements link us together globally.

### Colour palette

Your materials must include at least 10 per cent Sun Life yellow. There's a range of secondary colours to choose from. Just remember that our signature yellow must be prominent.



### Imagery

While we often use photography infused with light to evoke the warmth and energy of the sun, you can vary your images depending on the mood and message. Try to elicit the feeling of action, insight and empowerment. Visit the Photo showcase on Brand Share for ideas.



### Typeface

We use two typefaces, Agenda and Giovanni. Adapting the size and weight of these fonts offers you variations to match your message.



### Corporate signature

The Sun Life logo and wordmark must appear consistently – and together – in the bottom right corner of your marketing and communication materials.

### More information?

View our Corporate Identity Guidelines on Brand Share.



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## Writing in the Sun Life voice

When we write for Sun Life, we bring the brand to life. Inspired by our brand promise of *Action powered by insight*, we want our voice to be clear, compelling and unique to Sun Life Financial.

The good news is that many Sun Life writers are already doing a great job at getting our message across in a way that builds our brand. Here are a few tips on how to write with the brand in mind, every time.

**Find more insights and tools in the Writing Style Guide on Brand Share.**

### Before you write

#### Consider your audience first

Think about how they feel and consider their point of view. Think of what matters to them.

- Does your content reflect their concerns?
- Is it fact-based?
- Is it credible?

#### Then consider the brand promise

Use the Brand Guide & Checklist along with your understanding of the audience. Think about how your content reflects the brand promise.

- Is it based on an insight?
- Does it empower them to act on their own terms?
- Will it help them act?

We can write effectively in the Sun Life voice without ever using the words *insight*, *empowerment* and *action*. Demonstrate the brand promise in what you say and how you say it instead of writing it.

### Our voice is the brand

The Sun Life brand has a tone of voice, reflected in our word choice and manner. Here are four ways we can build the brand through our writing.

#### 1. Use customer language

Talk about the things that matter to customers in words they would use.

#### 2. We are candid

Create an honest exchange between two people having an important life conversation.

#### 3. We are warm

Be approachable, even humorous, but always respectful.

#### 4. We are human

Talk to real people who may find what we talk about very challenging.

### More ways to stay ON-BRAND

#### 1. Say more with less

A short headline packs punch. Use this prime real estate to convey one or more of our brand attributes. Highlight an insight. Be warm and approachable. Keep it candid and focused on the future.

#### 2. Match words to images

Sometimes, there just may not be a photo that matches the message. Meaningful text, a simple icon or image or a splash of colour can be more effective and fitting with your message than a sun-infused photo. Look at options.

#### 3. Tackle a tough subject

Sometimes we're asked to communicate technical information, or convey a serious message. We remain true to the Sun Life brand by using plain language and reflecting brand attributes where we can. Writing that is candid, empathetic and answer-driven helps build the brand and ensure that your message is understood.

### Plain language

We help people make their own choices by speaking to them in language they understand.

#### 1. Write it the way you say it

Use concise sentences, simple sentence structure, meaningful words. Try to write the way you speak, using words and phrases that people use every day.

#### 2. Talk to real people about authentic situations

Use simple, clear words that reflect our customers' real lives.

**Instead of:** Asset accumulation

**Write:** Building your nest egg

**Instead of:** Preserving your wealth

**Write:** Keeping more of what you've worked for

#### 3. Use the active voice

**Instead of:** The client was planning to meet his advisor.

**Write:** The client plans to meet his advisor.

#### 4. Be precise, concrete and specific.

Choose the right word for the job – avoid words that are vague or misleading.

**Instead of:** Declaration

**Write:** Statement



### More information?

See Brand Share for more before and after examples.