

Free Brand Strategy Template for Coaches

Build a clear, confident brand in 15 steps — from mission to action plan

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Your brand strategy is the foundation every piece of marketing, content, and client communication is built on. When it's clear, decisions get easier — you know what to say, who you're talking to, and what makes you different. When it's fuzzy, you're reinventing your messaging every time you sit down to write.

This template walks you through 15 sections covering everything from your mission statement to your 90-day action plan. Work through them in order or jump around based on what you know. Most coaches complete a first draft in 2–4 hours, then refine over the following week.

[How to Use This Template](#)

Google Doc version: Go to File → Make a Copy to save your own editable version.

PDF version: Print and fill in by hand, or use a PDF editor.

Start with Sections 1, 4, and 5 (Mission, Audience, Value Proposition) — these three anchor everything else. Return to the other sections in any order. Your first draft doesn't need to be perfect. It just needs to exist.

Footer reminder: Free brand strategy template from Paperbell — paperbell.com/blog/brand-strategy-template/

1. Mission Statement

Why it matters: Your mission statement is the present-tense reason your business exists. It grounds every piece of content and every offer in a shared "why" — yours and your clients'. Without it, your brand can drift in whatever direction feels appealing in the moment.

1. Who are the specific people you help? (Be as specific as possible — not "women" but "first-generation entrepreneurs in their 30s who feel like imposters")
2. What do you help them achieve? What's the concrete outcome or transformation?
3. What's the bigger result beyond that outcome — the life impact once the work is done?
4. Using the formula "I help [audience] achieve [outcome] so they can [bigger result]," write your first draft mission statement:
5. Does it feel true today, not aspirational? (Circle: Yes / Needs revision)

Example: "I help burnout-prone corporate professionals transition into meaningful work, so they can stop dreading Mondays and build a career that actually fits their life."

2. Vision Statement

Why it matters: Your vision statement is the future you're working toward — bold enough to inspire, specific

enough to believe. It gives your business a direction beyond this year's revenue goal and helps clients understand the larger change you're contributing to.

1. If your coaching business were wildly successful for 10 years, what would be different in your clients' lives? In your industry?
2. What world problem or gap does your work address?
3. Write a first draft vision statement (1–2 sentences, future-focused, starts with "A world where..." or "[Your name] envisions..."):
4. Does it make you feel something? (Circle: Yes, genuinely / It's fine / Needs work)
5. Would you put this on a wall in your office? If not, make it bolder.

Example: "A world where every professional has the support to build a career that reflects who they actually are — not who they were told to be."

3. Core Values

Why it matters: Core values are the non-negotiables that shape how you run your business and show up for clients. They're not aspirations — they're already true. When values are specific and genuine, they attract the right clients and repel the wrong ones (which is a feature, not a bug).

1. List 3 things you refuse to compromise on in your coaching practice, no matter what:
2. What do past clients consistently praise about working with you? (These often point to real values.)
3. What do you stand against in your industry? (Sometimes values are easier to define by contrast.)
4. For each of your 4–6 final values, write a one-sentence explanation of what it means in practice: Value 1:
_____ means
Value 2: _____ means
Value 3: _____ means

Value 4: _____ means

5. Test: could these values apply to any coach? If yes, make them more specific.

Example: "Evidence-based: When I recommend a framework or technique, I can tell you where it comes from and why it works."

4. Target Audience Persona

Why it matters: This is the most important section in the template. Vague audience definitions lead to vague marketing that connects with no one. The more precisely you can describe one real human being, the more your brand will feel like it was made specifically for them — because it was.

1. Describe your ideal client's current situation (job, life stage, what their days look like):
2. What do they want more than anything — the specific result they're chasing?
3. What are they afraid of? What's the objection or fear running in the back of their mind?
4. What have they already tried that hasn't worked? Why didn't those solutions fix it?
5. What are they saying to themselves when they first find you? Write the sentence running through their head:

Example for Prompt 5: "I know I need to make a change but I don't know where to start — every coach I look at seems exactly the same and I can't tell who's actually good."

5. Value Proposition

Why it matters: Your value proposition is your honest answer to "Why should this person hire me over everyone else?" It's not a tagline — it's the real differentiator. Without a clear value proposition, your marketing defaults to listing credentials, which rarely converts.

1. What's unique about your background, method, or lived experience that directly relates to your coaching?
2. What do you offer that your competitors don't (or don't emphasize)?
3. What specific result can clients expect that you're confident you can deliver?
4. Write your value proposition in one sentence (aim for: specific, honest, clear enough for a 12-year-old):
5. Four-point check — is your value prop: Relevant to your audience? Unique to you? Believable? Simple enough? (Circle any that need work.)

Example: "I'm the only certified financial therapist in the coaching space with a clinical background in anxiety treatment — I work on both the money mindset and the nervous system response at the same time."

6. Brand Voice and Tone

Why it matters: Your brand voice is the personality behind all your words. It's what makes your emails sound like you, not a press release. A distinct, consistent voice builds recognition and trust over time — clients feel like they know you before they've ever spoken to you.

1. List 3 adjectives that describe your communication style (how you actually talk and write, not how you wish you did):
2. For each adjective, translate it into a concrete example: "When I say [adjective], I mean [specific behavior or example]":
3. Name 2–3 people or brands whose voice you admire and want yours to feel similar to:
4. List 3 things your voice is NOT (e.g., "Never corporate jargon," "Never fear-based," "Never too casual to be taken seriously"):
5. Tone calibration: How does your tone shift in these contexts? Social media post:
Sales page:
Discovery call:

Client check-in:

7. Brand Personality

Why it matters: When your brand has a clear "character," making on-brand decisions gets much faster. You're not running through a checklist — you're asking "would this person say this?" and getting an instant answer.

1. If your brand were a person, how old are they and what do they do?
2. How do they make people feel when they walk into a room?
3. What are they passionate about? What do they talk about when work comes up?
4. What would they never say or do? What are their pet peeves?
5. Write a 3–5 sentence character description of your brand as a person:

Example: "Think of a 44-year-old woman who left her corporate law career to become a coach. She's warm, she's been through real stuff, she doesn't take herself too seriously, and she'll call you on your excuses with a smile. She says 'I hear you and also I'm not buying it' without making you feel judged."

8. Brand Story

Why it matters: Clients don't just hire a service — they hire a person. Your brand story is the evidence that you understand where they are because you've been there. It makes your expertise feel earned, not just credentialed.

1. Where were you before? Describe the struggle, confusion, or wrong path (the before-state):
2. What happened — the moment or series of moments that changed things?
3. What did you learn or discover? What became clear that wasn't before?

4. How does your experience directly connect to the work you do with clients today?
5. Write a 3–5 sentence brand story draft (past → turning point → discovery → so now I help you):

9. Positioning Statement

Why it matters: Your positioning statement defines your place in the market — who you serve, what you do, and what makes you different, all in one sentence. It's mostly an internal anchor, but it keeps every marketing decision pointed in the same direction.

1. Complete the formula: "For [target audience] who [struggle or desire]..."
2. "...[your name/brand] is the [coaching category or type]..."
3. "...that [key differentiator or primary outcome]."
4. Combine and read it aloud. Does it feel true? Does it feel different from what every other coach in your space would say?
5. Refine: could this positioning statement only be yours? If a competitor could say the same thing, make it more specific.

Example: "For early-career professionals who feel stuck and undervalued, [name] is the career coach who helps them go from invisible to promoted in 90 days — without playing political games."

10. Competitor Matrix

Why it matters: Understanding your competitive landscape helps you find the whitespace — the angle or audience nobody in your market has fully claimed. This section prevents you from accidentally copying someone else's positioning without realizing it.

Competitor 1:

What are they known for / what angle do they take?

Who do they seem to target?

One thing they do well:

One gap in their positioning you could fill:

Competitor 2:

What are they known for?

Who do they target?

One thing they do well:

One gap:

Competitor 3:

What are they known for?

Who do they target?

One thing they do well:

One gap:

Overall whitespace observation: What angle, niche, audience segment, or approach is nobody in your space fully owning?

11. Brand Pillars and Messaging Themes

Why it matters: Brand pillars are the 3–5 themes your brand keeps returning to. They give you a consistent

content filter: does this post, email, or speaking topic reinforce one of my pillars? If not, it might not be worth your time.

1. What are the recurring topics or themes in your best conversations with clients?
2. What are the beliefs or perspectives you share across all your content — the "this is what I actually believe" statements?
3. List 3–5 brand pillars (themes, not features). Each should be something you could write 20 posts about:
Pillar 1:
Pillar 2:
Pillar 3:
Pillar 4:
Pillar 5:
4. For each pillar, list one content idea that embodies it:
5. Gut check: if someone followed your brand for 30 days, would these themes emerge clearly? If not, amplify.

12. Brand Promise

Why it matters: Your brand promise is the one thing every client can always count on from you. It's a commitment you actually keep — not a marketing claim. When your promise is clear and consistently delivered, it becomes the foundation of your reputation and referrals.

1. What do all your past clients say they can always count on from you? (Ask some if you're not sure.)
2. What standard have you held yourself to in every client relationship, even when it was inconvenient?
3. Write your brand promise in one sentence (starts with "Every client can always count on..."):
4. Is this promise something you can actually keep 100% of the time? If not, revise it.
5. How will a new client know you've kept this promise? What's the evidence they'd point to?

Example: "Every client gets my complete focus — I cap my roster at 10 clients at a time so no one gets a distracted version of me."

13. Tagline and Slogan Options

Why it matters: A clear tagline gives you a shorthand for your brand that shows up in your bio, website header, and email signature. It doesn't need to be clever — it needs to be true and memorable.

Generate 5–10 options before narrowing:

Result-focused (what clients achieve):

- 1.
- 2.

Feeling-focused (how clients feel working with you or after):

- 3.
- 4.

Audience-focused (who you're for):

- 5.
- 6.

Process-focused (how you work):

- 7.

Contrast-focused (what you're not):

- 8.

Narrow to top 3:

A.

B.

C.

Test: Read each to someone outside your business. Which one makes them immediately understand what you do? Winner:

14. Visual Identity Notes

Why it matters: Your visual identity should express your brand strategy, not the other way around. Capturing your visual instincts now — before you hire a designer — saves significant time in revision cycles and keeps you from a rebrand that doesn't actually solve the underlying clarity problem.

1. List 3–5 adjectives for how you want to visually feel (e.g., warm, minimal, bold, professional, human):
2. Colors you're naturally drawn to:
Colors you want to avoid:
3. Name 2–3 coaches or brands whose visual style you like. What specifically do you like about each?
4. What visual elements feel non-negotiable to you? (e.g., "I want real photos of me," "No stock imagery," "Clean and minimal"):
5. What should your visuals communicate about you that words alone can't?

15. 30/60/90 Day Action Plan

Why it matters: A brand strategy document that stays in a folder doesn't do anything. This section converts your strategy into a concrete sequence of actions — so the thinking actually shows up in your business.

Days 1–30: Clarify and align

1. What's the first section you'll complete today?
2. Who will you share your draft with for a reality check?
3. Which existing piece of content (bio, website homepage, about page) most needs updating based on what you've defined?

Days 31–60: Audit and update

4. List the top 3 places your brand shows up where it doesn't yet reflect your strategy:
5. What one change in each would have the biggest impact?

Days 61–90: Create cornerstone content

6. For each of your brand pillars, write the title of one piece of content you'll create that embodies it: Pillar 1 content:
Pillar 2 content:
Pillar 3 content:
7. When will you schedule your first annual brand strategy review? (Set the calendar invite now.)