



Magnetic **Brand**

BRAND BUILDING
WORKBOOK

16 SESSIONS

BY INALTUM

S e s s i o n 0 1

Your Core Values

Purpose of this Session

Every brand starts with you, the entrepreneur. Your values shaped the business you built and how your customers experience it. Most of the time, these values are felt but rarely defined. By naming them, you'll uncover the magnetic force that draws your ideal clients in.

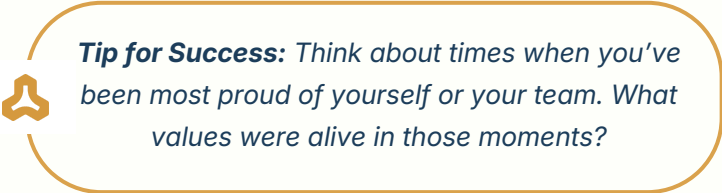
By the end of this session, you'll walk away with:

- ✓ 4-5 Core Values
- ✓ Vivid descriptions to exemplify them
- ✓ Catchphrases to make them memorable

Step 1: Write It All Down (Make It Ugly)

Don't edit. Don't polish. Just write everything that comes to mind:

- What you value most in life & work.
- Behaviors you expect from yourself and your team.
- Traits you look for in "your people."



Tip for Success: Think about times when you've been most proud of yourself or your team. What values were alive in those moments?

Brainstorm here



Step 2: Group Your Values

Look for patterns. Circle, highlight, or sort them into **4–6 clusters**. Each cluster represents a potential Core Value.

Groupings

Group 1

Group 2

Group 3

Group 4

Group 5

Group 6



Tip for Success: *Imagine each group as the trunk of a tree, with your brainstormed words as branches.*

Step 3: Define Each Group as a Core Value

Now transform each cluster into a polished Core Value. For each one:

1. Give it a name (word or short phrase).
2. Write 2–3 sentences describing what it means in the context of your business.
3. (Optional) Add a short, memorable catchphrase.

Core Values (Final Draft)

Core Value #1

Name: _____

Definition: _____

Catch phrase: _____

Core Value #2

Name: _____

Definition: _____

Catch phrase: _____

Core Value #3

Name: _____

Definition: _____

Catch phrase: _____

Core Value #4

Name: _____

Definition: _____

Catch phrase: _____

Core Value #5

Name: _____

Definition: _____

Catch phrase: _____

Core Value #1

Core Value: _____

Definition: _____

Catch phrase: _____

Core Value #2

Core Value: _____

Definition: _____

Catch phrase: _____

Core Value #3

Core Value: _____

Definition: _____

Catch phrase: _____

Core Value #4

Core Value: _____

Definition: _____

Catch phrase: _____

Core Value #5

Core Value: _____

Definition: _____

Catch phrase: _____

Wrap Up

Your Core Values

Your deliverable for this session is a **clearly articulated set of Core Values**—the foundation of your brand’s magnetism.

Instructor’s Final Word

These Core Values are not abstract ideals—they’re the bedrock of your Magnetic Brand. As we move forward, they’ll align everything else: your mission, your strategy, your client experience.

Instructor’s Example

Execution

We don’t just craft strategies—we execute on them. We die a little inside when ideas collect dust. We burn out when plans stall. We exist to help business owners gain sustainable momentum—to take bold, decisive action that gets results.

“Vision without execution is delusion.”

S e s s i o n 0 2

Who Do You Serve

Purpose of this Session

To build a Magnetic Brand, you need clarity on who you're trying to attract. If you try to aim your magnet at everyone, you will still pull some people in—but you'll attract exponentially fewer of the right people, and you'll burn substantially more energy in the process.

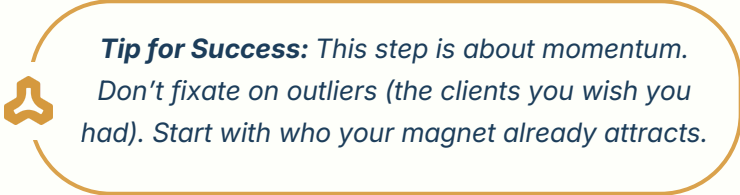
By the end of this session, you'll walk away with:

- ✓ A demographic profile of your ideal client.
- ✓ An internal articulation you can use to filter decisions.
- ✓ An external articulation you can use to describe who you serve to others

Step 1: Identify Your Current Clients

Start by reflecting on the clients you've already worked with.

Prompt: Imagine putting every client from the last two years into one room. Focus on the 75% you served most easily with tools and processes you already know well. Who are they and what's true of them?



Tip for Success: This step is about momentum. Don't fixate on outliers (the clients you wish you had). Start with who your magnet already attracts.

Brainstorm here



Step 2: Build a Demographic Profile

Now, let's turn those patterns into a structured profile. Fill in as much detail as you can.

Demographic Profile Fields

Age range: _____

Annual income: _____

Stage of life: _____

Why they're interested in my product/ service:

Where they found/ first met me:

What I have in common with them:

Why they first used my product/ service:

Why they continue to use/ refer me:

Step 3: Write Your Internal Statement

This is for *you* and *your team*. It helps you focus your magnet in the right direction.

Template (fill in the blanks):

I am magnetic to people who are [stage in life], between [ages], making [income] per year. They are interested in my product/service because [why they are interested in my product or service]. They found me via [where they found you] and they resonate with me because [commonality]. We first started working together because [why they first used you], and we continue working together because [why they continue to use you/referrals].

Your Internal Statement

Step 4: Write Your External Statement (Magnet Statement)

This is what you'll say to others when they ask, "Who do you serve?"

Template (fill in the blanks):

I serve people who are [reason they're interested in your service]. My repeat clients choose me over others because [why they continue to use/referrals].

Your External Statement (Magnet Statement)



Tip for Success: Keep it simple and repeatable. If someone can repeat it back to you after hearing it once, it's clear.

Wrap Up

Who You Serve

By the end of this session, you should have:

A **Demographic Profile** (structured details).

An **Internal Statement** (guides your focus).

An **External Statement** (Magnet Statement) (guides what you say to others).

Instructor's Final Word

When you can name exactly who you serve, you will transition from *chasing* opportunistic revenue to *generating* intentional revenue. This pivot is key to achieving breakthrough growth. In the metaphor of creating a magnetic brand, you should now have clarity on where to put your magnet for maximum attraction.

Instructor's Example

Demographic Profile: Professionals in their 40s–50s, earning \$150k–\$300k, homeowners preparing for retirement, found through referrals, value expertise and long-term trust.

Internal Statement: I am magnetic to professionals in midlife, aged 40–55, making \$150–300k annually. They are drawn to me because I simplify financial decisions, and we connect over a shared value of family stability. They first worked with me because of referrals, and they stay because I consistently deliver peace of mind.

External Statement: I serve mid-career professionals who want financial clarity & stability. My clients keep coming back as they trust my guidance and know I help them protect what matters most.

S e s s i o n 0 3

What Do You Do for Them?

Purpose of this Session

Now that you've identified who you serve, it's time to clarify what you actually do for them. This isn't about job titles or services—it's about the real value your Magnetic Brand delivers.

By the end of this session, you'll have:

- ✓ A clear problem statement (what need you meet).
- ✓ A map of the values you believe your brand provides across the four tiers of the Magnetic Value Pyramid.

Step 2: Map Your Values Using the Magnetic Value Pyramid

Getting their problem solved is what brings clients through the door—but the *value* you provide is what keeps clients coming back. Let's identify your value at four possible levels.

1. Functional Value (Foundation)

The practical, baseline reasons one chooses your brand. Here are 7 Magnetic Functional Values:

1. Saves time
2. Reduces hassle
3. Simplifies a task
4. Provides reliable quality
5. Keeps things organized
6. Gives expert, actionable information
7. Makes people money

Pick up to **2-3** that fit your business and add to the pyramid on the next page.

2. Emotional Value (Connection)

The feelings your brand creates in clients. Here are the 6 Emotional Values:

1. Reduces stress or worry
2. Makes life more enjoyable
3. Builds trust and confidence
4. Provides beauty or aesthetic delight
5. Sparks nostalgia or positive memories
6. Feels fun, uplifting, or energizing

Pick up to **2-3** that fit your business and add to the pyramid.

3. Transformational Value (Life-Changing)

The deeper, personal growth impact your brand can have on your clients. Here are the five Transformational Values:

1. Inspires hope and motivation
2. Builds belonging or community
3. Creates a sense of accomplishment
4. Unlocks new opportunities or access
5. Helps people become who they want to be

Pick up to **2** that fit your business and add to the pyramid.

4. Social Impact (Beyond Self)

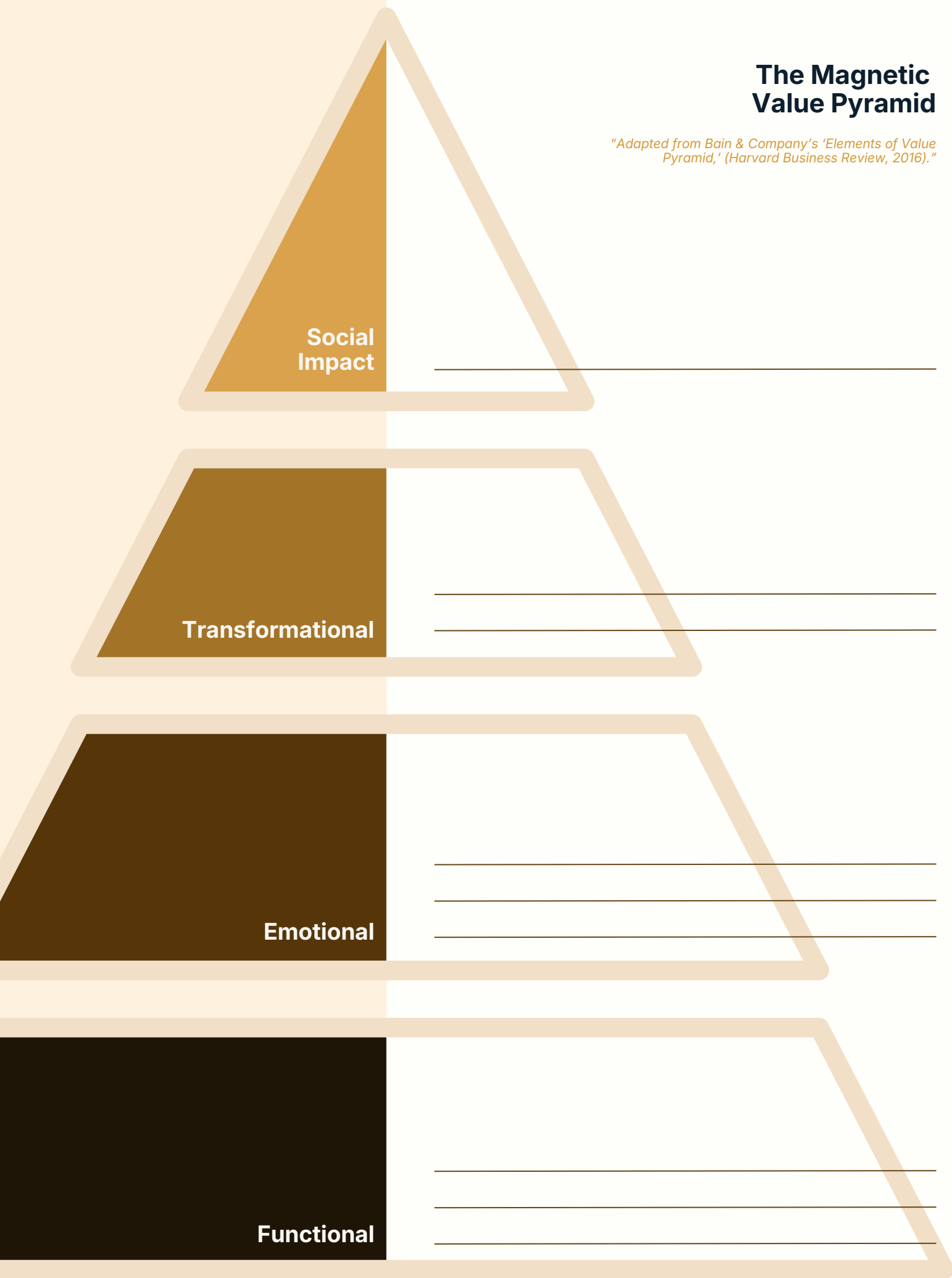
The contribution your brand makes to the world. Examples might include: Gives Back, Strengthens Community, Promotes Sustainability. Pick **only** if it's deeply authentic, and add to the pyramid.



Tip for Success: *Don't force social impact. If it doesn't energize you deeply, it will come across as a gimmick.*

The Magnetic Value Pyramid

"Adapted from Bain & Company's 'Elements of Value Pyramid,' (Harvard Business Review, 2016)."



Wrap Up

What You've Identified

Your **Magnetic Values** are the bedrock of how clients experience you. They move you beyond selling services to delivering transformation.

In the next session, we're going to dig deeper and pressure test the value you say your brand provides to its clients.

Instructor's Final Word

Most businesses stop at Functional Value. Magnetic Brands rise higher. The more of your value that climbs into Emotional and Transformational territory, the more powerful your magnet becomes.

S e s s i o n 0 4

How Do You Do It for Them?

Purpose of this Session

There are two versions of your business: the *ideal* and the *real*. Both matter but only the real version is experienced by clients. A Magnetic Brand is built on what clients actually feel & say about you.

By the end of this session, you'll have:

- ✓ A reality check on the values you claim to deliver.
- ✓ Concrete examples of how each value shows up in practice.
- ✓ A refined list of the 3–4 values you own right now.



Ideal vs. Real (Important Note)

No matter how magnetic your Magnetic Brand feels in your imagination, if people's actual experience doesn't line up, it isn't magnetic in the real world. This exercise helps you see your business as clients do.

Step 1: Put Your Values To The Test

From Session 3, revisit the values you identified. For each one, write down the specific actions you take that prove you deliver it. Organize them under the same four tiers of the Magnetic Value Pyramid.

Functional Values

Value: _____

Ways I deliver it:

1 _____

2 _____

3 _____

Value: _____

Ways I deliver it:

1 _____

2 _____

3 _____

Value: _____

Ways I deliver it:

1 _____

2 _____

3 _____

Emotional Values

Value: _____

Ways I deliver it:

1 _____

2 _____

3 _____

Value: _____

Ways I deliver it:

- 1 _____
- 2 _____
- 3 _____

Value: _____

Ways I deliver it:

- 1 _____
- 2 _____
- 3 _____

Transformational Values

Value: _____

Ways I deliver it:

- 1 _____
- 2 _____
- 3 _____

Value: _____

Ways I deliver it:

- 1 _____
- 2 _____
- 3 _____

Social Impact Value (optional)

Value: _____

Ways I deliver it:

- 1 _____
- 2 _____
- 3 _____

Step 2: Look Through Your Client's Eyes

Now check your list against reality.

Prompts to Reflect:

- Do clients talk about this value in reviews or testimonials?
- Do referrals highlight this value when recommending me?
- Does this value show up consistently in how I serve?

Functional Values

Value: _____

What client's actually say:

Value: _____

What client's actually say:

Value: _____

What client's actually say:

Emotional Values

Value: _____

What client's actually say:

Value: _____

What client's actually say:

Value: _____

What client's actually say:

Transformational Values

Value: _____

What client's actually say:

Value: _____

What client's actually say:

Social Impact Value (optional)

Value: _____

What client's actually say:

Step 3: Prioritize the Values You Truly Own

Not every value you aspire to deliver will hold up under scrutiny—and that’s okay. Most businesses are best at 3–4. Those are the ones that both **align with your Core Values, energize you when you deliver them, and the ones your clients comment on the most.**

Revisit your values from section 3 and complete the below.

VALUE	HOW I DELIVER IT	WHAT CLIENTS SAY
<hr/>	1) <hr/> 2) <hr/> 3) <hr/>	<hr/> <hr/> <hr/>
<hr/>	1) <hr/> 2) <hr/> 3) <hr/>	<hr/> <hr/> <hr/>
<hr/>	1) <hr/> 2) <hr/> 3) <hr/>	<hr/> <hr/> <hr/>
<hr/>	1) <hr/> 2) <hr/> 3) <hr/>	<hr/> <hr/> <hr/>

Tip for Success: *If you’re a wealth manager, your functional value is that you “make people money,” but would anyone work with a wealth manager who didn’t make them money? Of course not, so there’s no real magnetism for your brand in that value.*



BUT, does your brand deliver that value in a way that is above-and-beyond? Do you make clients money by giving them access to investment opportunities they’d otherwise not have access to? If so, then that makes your brand magnetic.

If a value is hard to back up with concrete actions or client feedback, it may belong in the “aspirational” bucket for now—not the “proven” one. That’s okay. Keep it on your radar as something to grow into.

Wrap Up

What You've Identified

At this point, you've moved from aspiration (Session 3) to reality (Session 4). You've:

Tested your values against how you actually deliver them.

Considered how your clients experience and describe them.

Landed on the 3–4 values you truly own today.

Instructor's Final Word

Don't worry if you're not delivering higher-order values (transformational or social impact) yet. As your Magnetic Brand matures, opportunities to deliver those will emerge naturally. For now, own what you do best and deliver it with confidence.

S e s s i o n 0 5

Why Do You Do It?

Part I — Your Energy

Purpose of this Session

Your energy is the power source behind your Magnetic Brand. If you're not energized by your work, attempts to deliver value will fall flat. But when you work from a place of passion, your energy amplifies your magnetism, pulling your ideal clients toward you.

By the end of this session, you'll have:

- ✓ A list of specific activities and moments that energize you.
- ✓ Clarity on the type of work that fuels your sustainability and momentum.




Energy Matters

If you don't protect your energy, you'll burn out. If you lean into the work that excites you, you'll massively amplify your brand's magnetism.

Step 1: "I'm In My Element When..."

Write at the top of your page: **I'm in my element when...**

Now, brainstorm as many answers as you can. Think of situations, tasks, or roles that light you up.

 **Tip for Success:** Don't censor yourself. Even if it feels small ("I love checking things off a list") or big ("I thrive presenting to a crowd"), write it down.

Brainstorm Space:

A large grid of small blue dots for brainstorming.

Step 3: Capture Your Energy Drivers

From your brainstorm and themes, distill a list of up to **5 Energy Drivers**.

These are the things that fuel your Magnetic Brand and keep you going long-term.

Final Deliverable - My Energy Drivers

1 _____

2 _____

3 _____

4 _____ *Optional*

5 _____ *Optional*

Wrap Up

What You've Identified

By naming your **Energy Drivers**, you've uncovered what sustains your magnetism.

These will help you:

Avoid work that drains you.

Seek out opportunities that fuel you.

Build a Magnetic Brand that lasts because it's aligned with your natural energy.

Instructor's Final Word

Your Magnetic Brand is strongest when it's powered by joy and energy. Protect these drivers—they're not just preferences, they're critical fuel that massively boost your brand's magnetism.

S e s s i o n 0 6

Why Do You Do It? *Part II — Your Mission*

Purpose of this Session

Your Mission Statement answers: Why do you do what you do? It combines your Core Values, Magnetic Values, and Energy Drivers into a client-facing declaration of your Magnetic Brand's reason for being.

By the end of this session, you'll have:


- ✓ Raw statements linking values + energy.
- ✓ A polished Mission Statement that resonates with you and your clients.
- ✓ 1-2 primary drivers that rise to the top.

Step 1: Make Raw Statements

Use this framework:

"I'm energized to [what you do] by [how you do it] because [a core value]. I'm most energized when [example of being in your element]."

Draft Statements

 **Tip for Success:** Write several. Don't stop at one or two. The gold is usually hiding in your third or fourth draft.

Step 2: Spot Your Primary Drivers

Look over your statements. Write down the 1-2 that feel strongest—where your **core values, magnetic values, and energy drivers** intersect.

Your Primary Drivers

Step 3: Combine Into a “Why” Sentence

Now complete this sentence:

“In totality, we do what we do because...”

Your “Why” Statement



Instructor’s Example (Real Estate):

“In totality, we do what we do because we’re driven to be the foremost experts in our market who maximize the total amount of money we can get for our clients and for ourselves.”

Step 4: Craft Your Mission Statement

Transform your “Why” into a **client-facing Mission Statement**. Swap “in totality” for “our mission is to...” and refine until it feels natural, clear, and inspiring.

Final Mission Statement



Tips for Success:

- Keep it in plain English—avoid jargon.
- Imagine it as something a client would proudly say about you in a review.
- Test it aloud: does it make your heart sing?

Wrap Up

What You've Built

You now have a **Mission Statement** that is client-facing, energizing, and aligned with your Magnetic Brand.

It will guide your decisions, messaging, and strategy.

Instructor's Final Word

Memorize this—not with your head, but with your heart. The right Mission Statement feels alive. It excites you, and it resonates with your clients.

S e s s i o n 0 7

Why Are You Qualified?

Purpose of this Session

To understand the most magnetic value your Magnetic Brand provides, we need to look at your competencies—the things you're naturally great at. When you combine competence with energy, you unlock a level of magnetism that competitors can't match.

By the end of this session, you'll have:

- ✓ A wide-ranging list of your competencies.
- ✓ Clarity on why you're uniquely qualified to deliver your Magnetic Values.
- ✓ A distilled list of your top 5–7 competencies.

Step 2: Spot The Standouts

Review your brainstorm.

Which competencies show up most often in your work?
Which align closely with your Energy Drivers from Session 5?
Bold these competencies.

Step 3: Capture Your Core Competencies

Now refine your brainstorm into a list of **5-7 competencies** that best describe why you're qualified to deliver your Magnetic Values.

Final Deliverable — My Top Competencies

- _____
- _____
- _____
- _____
- _____
- _____ *Optional*
- _____ *Optional*

Wrap Up

What You've Built

You now have a clear list of your **core competencies**—the things you're naturally gifted at and capable of delivering with excellence.

These, combined with your Energy Drivers, make your Magnetic Brand **one-of-a-kind**.

Instructor's Final Word

Your competencies are not just skills, they're proof that you can deliver on your promises. Together with your energy, they form the strongest source of trust and magnetism in your business.

S e s s i o n 0 8

Your Magnetic Core

Purpose of this Session

Your **Magnetic Core** is your Magnetic Brand's promise to the market. It's the single word or short phrase that captures the essence of your brand.

By the end of this session, you'll have:

- ✓ A master list of inspirational values and actions.
- ✓ Refined themes that point to your essence.
- ✓ A distilled Magnetic Core: the defining promise of your Magnetic Brand.



HARD WORK AHEAD

This is the most difficult part of the Magnetic Brand journey. Here's what you cannot do:

- Settle for a sentence instead of a word or two.
- Settle for a list of words.
- Pick something that "kind of works."
- Skip ahead and come back later.

Step 2: Find Themes

Now, **reflect** on your lists. Answer these prompts:

- Are there any words that unify 80% of what I wrote?

- Are there themes that emerge?

- Are there adjectives/adverbs that seem to operate behind these words?

- Are there nouns that these words could comfortably live under or be traced to?



Tip for Success: Use our AI Thought Partner to accelerate this process. Paste your lists into a prompt like: "Here are my core values, magnetic values, competencies, energy drivers and key themes. Please help me distill these into 2–3 candidate words that could represent my Magnetic Core. Suggest patterns you see."

Step 3: Generate Candidate Words

From your lists and themes, brainstorm 2–3 strong candidate words.

Candidate Words

1 _____

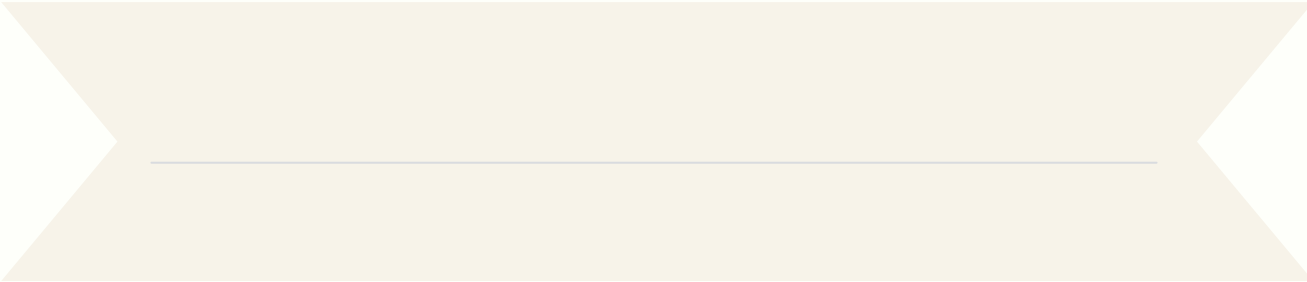
2 _____

3 _____

Step 4: Choose Your Magnetic Core

Pick the one that feels like **turning on a nuclear reactor**—a word that sparks energy and alignment across everything you’ve written.

My Magnetic Core



Instructor’s Example

Magnetic Core: Savant

A learned or talented person with exceptional aptitude in a field.

Why it works: “Savant” connects to values like expertise, actionable information, making people money, and execution. It also inspires imagery: how the Magnetic Brand looks, feels, and interacts with clients.

Wrap Up

What You've Built

You now have your **Magnetic Core**: a single word or two that acts as a litmus test for every decision and expression of your Magnetic Brand.

Instructor's Final Word

The right word will unlock your imagination.

You should feel it in your gut and see its influence ripple across your design, strategy, and client experience.

S e s s i o n 0 9

Brand Position

Purpose of this Session

Now that you have a high-resolution understanding of your magnetic core, magnetic values, and core values, we're going to pivot to identifying where these things position your brand in the marketplace relative to its competitors.

By the end of this session, you'll have:

- ✓ A positioning grid defining your competitive field.
- ✓ Honest placement of competitors.
- ✓ Clarity on your Magnetic Brand's current position and whitespace opportunities.



Why Brand Positioning Matters

Magnetic Confidence — knowing your position lets you radiate authority while acknowledging competitors with balance and clarity.

Field Control — by defining the framework of options, you establish the “field” prospects adopt to orient decisions.

Focused Pull — clear positioning directs your energy toward strategies that amplify magnetism instead of diminishing it.

Step 1: Define the Marketplace Axes

Most markets are defined by 2 key values competitors use to differentiate themselves (e.g., **Price [low to high]** vs. **Service Level [low to high]**).

Your Axes

X-Axis

Y-Axis



Tip for Success: Think of what clients actually notice when comparing providers (not what insiders care about).

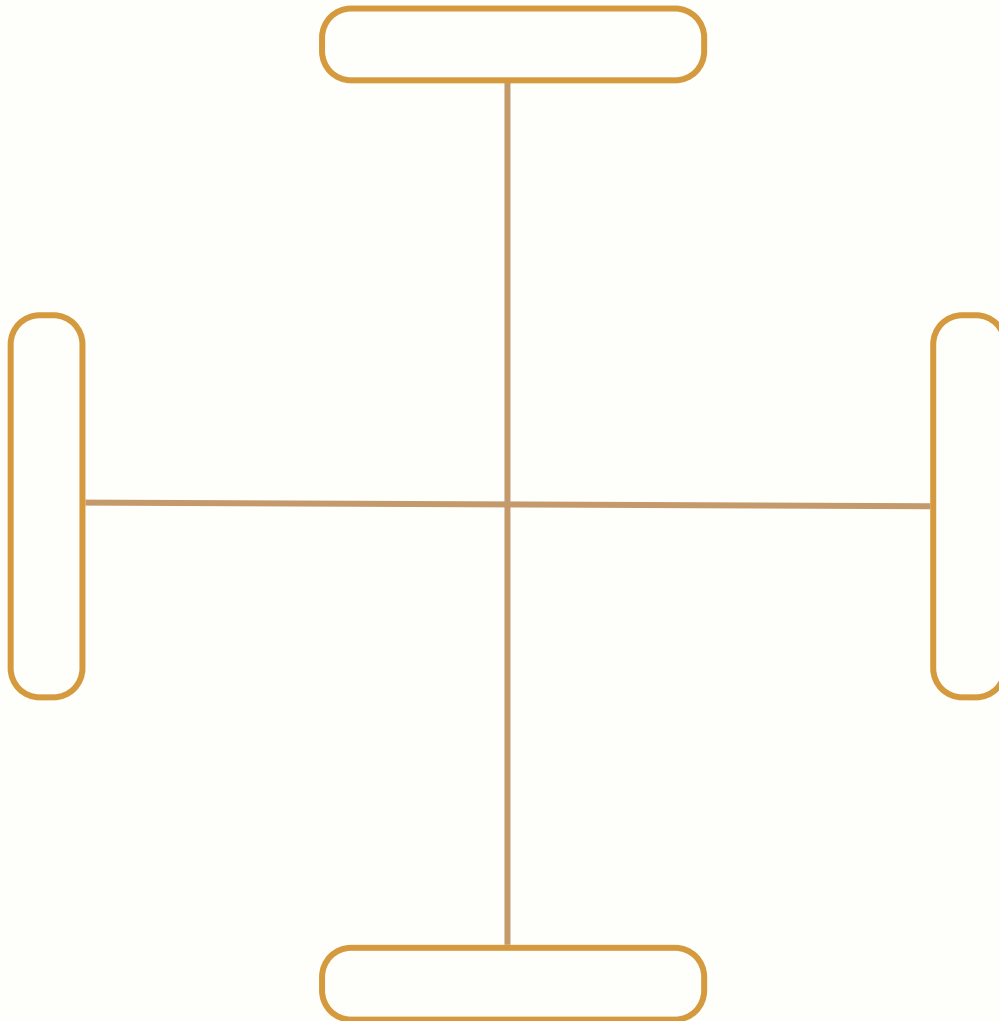
Step 2: Map Your Competitors

Add your X & Y Axis to the grid. Place 5–7 competitors where you believe clients see them.



Instructor's Note: Be brutally honest. See your competitors as your clients likely do—not how you, as an insider, view them.

Positioning Grid



Step 3: Add Your Magnetic Brand

Now, place your Magnetic Brand on the grid. Base this on what clients say in reviews/ testimonials, especially when they describe the values identified earlier. Then draw an arrow from where it is currently to where you want it to be as you execute on your Magnetic Brand.

Step 4: Reflect on What You See

Now that your grid is complete, answer these questions:

- Are you in a crowded area?

- Which competitors are closest to where you are?

- Which competitors are nowhere near you?

- Which competitors are in an area where you want to be?

- Which competitors are in an area of the grid you don't want to be?

- Do you see whitespace you could claim to become highly magnetic?

Wrap Up

What You've Built

You've now placed your Magnetic Brand in the marketplace with clarity and honesty. This positioning gives you:

A **map** of the competitive field.

Awareness of who you're closest to and how you differ.

Insight into **opportunities** to claim whitespace and amplify your magnetism.

Instructor's Final Word

Don't fear being close to competitors. Proximity shows you where to sharpen your differentiation. The goal isn't to be everywhere—it's to be powerfully magnetic where you are.

S e s s i o n 1 0

Execution

Purpose of this Session

Until now, we've focused on concepts. The concepts are important because they help us see where to go and how we might get there, but this work only drives revenue and growth if it is put into action.

By the end of this session, you'll have:

- ✓ A **Considerations List** of current decisions, opportunities, and crossroads. This list will be valuable as we move into four key areas of execution within your business: strategy, competitive advantage, presence, and communication.



Vision Without Execution Is Delusion

Concepts are powerful, but they only matter if you execute. This session sets the stage for putting your Magnetic Brand into action.

Build Your Considerations List

Answer these prompts. Don't edit, just capture everything on your mind. Everything you write below is what we'll refer to as your **Consideration's List** from this point forward.

Prompts

What sponsorships, software, materials, or campaigns am I thinking of spending money on right now?

What do I plan to say in my marketing materials?

If a prospect asked me what makes me different from my biggest 3–5 competitors, what would I tell them?

How would I describe my Magnetic Brand's current look and feel?

Am I at a crossroads with my Magnetic Brand? If so, what are the possible paths forward, ranked from most to least likely?

Wrap Up

What You've Built

You now have a **Considerations List** capturing your current marketing and branding crossroads.

This raw material will feed directly into the next four sessions, where you'll refine your **Strategy**, identify your **Competitive Advantage**, guide your **Presence**, and strengthen your **Communication**.

Instructor's Final Word

This is the hinge moment of the course. Don't hold back here—the more honest and complete your Considerations List, the more valuable the next sessions will be.

S e s s i o n 1 1

Strategy

Purpose of this Session

Strategy is the **magnetic field** of your Magnetic Brand, it aligns your decisions and directs your actions. Clients experience it as consistency, which builds trust and amplifies magnetism.

By the end of this session, you'll have:

- ✓ Clear Guiding Principles (rules of thumb).
- ✓ A Strategic Action Plan (prioritized decisions).
- ✓ A one-sentence Strategy Statement.



Strategy = Magnetic Field

Strategy is the magnetic field of your brand, the invisible force that aligns your decisions and directs your actions. Clients experience strategy as brand consistency. This will build their trust in your brand, increasing its magnetism.

Step 1: Recall Your Prior Work

Write down the anchors of your Magnetic Brand:

Anchors

Mission Statement

Magnetic Core

Market Position

eg: high service + high price = clients who expect the best.

Step 3: Distill Into 3–5 Guiding Principles

Group your rules of thumb, **combine** repeating themes, and **refine** into 3–5 Guiding Principles.

Guiding Principles

1 _____

2 _____

3 _____

4 _____ *Optional*

5 _____ *Optional*

Instructor's Notes

- Your guiding principles should be:
- Clear, memorable rules by which to run your business.
 - Guardrails to ensure consistency and trust, critical to your brand's magnetism.
 - Kept visible. They're the true north to which your brand's strategic compass points.
 - A filter for decisions. If it doesn't align, it's out.

Step 4: Build Your Strategic Action Plan

Take your **Considerations List** from Session 10. Filter it through your Guiding Principles:

- If an item doesn't align → eliminate it.
- If it partly aligns → adjust it.
- If it fully aligns → keep it.

Prioritize what remains in order of impact.

Strategic Action Plan (rank-ordered)

1 _____

2 _____

3 _____

4 _____

5 _____

Step 5: Write Your Strategy Statement

First, Reference your **Strategic Action Plan + Client Profile**. Note recurring opportunities or themes below. These reveal your Brand's *general approach*.

General Approach

- 1 _____
- 2 _____
- 3 _____
- 4 _____

Next, ask yourself what bigger **truth, value, or direction** these approaches point to. This is your brand's *strategic thrust*.

Strategic Thrust

- 1 _____
- 2 _____
- 3 _____

Finally, reference the above to write one sentence that captures your Magnetic Brand's strategy. Use the following formula as your guide:

"My Magnetic Brand's Strategy is to [**strategic thrust**] by [**general approach**]."

My Strategy Statement

Examples:



- My Magnetic Brand's Strategy is to **grow authority** by **consistently showing up as an educator in my space**.
- My Magnetic Brand's Strategy is to **expand reach** by **partnering with aligned organizations and networks**.
- My Magnetic Brand's Strategy is to **inspire aspiration** by **showcasing transformational client stories**.

Wrap Up

What You've Built

You now have:

3–5 Guiding Principles

A Strategic Action Plan

A one-sentence Strategy Statement that aligns decisions and directs actions

Instructor's Final Word

A great Strategy has endurance. Tactics may change (e.g., in-person → online), but if they align with your Guiding Principles, your Strategy holds steady.

S e s s i o n 1 2

Competitive Advantage

Purpose of this Session

Your Magnetic Brand is attractive, but without **Competitive Advantage**, you risk being interchangeable. Competitive Advantage converts magnetism into market share.

By the end of this session, you'll have:

- ✓ A list of potential competitive advantages.
- ✓ 1–2 clearly articulated Competitive Advantages that make you stand out as one-of-one.
- ✓ A test to refine them.



Magnetic But Interchangeable?

Without Competitive Advantage, you're just one of many. With it, you're one of one.

Step 1: Recall Your Inputs

Competitive Advantage emerges from:

- Your **Magnetic Values** (the value you deliver to clients).
- Your **Magnetic Core** (your promise to the market).
- Your **Competencies** (what you're best at).

Inputs Recap

Magnetic Values _____

Magnetic Core _____

Your Competencies _____

Step 2: Brainstorm Competitive Advantages

List 3–5 specific ways you are different from your competitors. Be concrete, not vague.

My Potential Competitive Advantages

1 _____

2 _____

3 _____

4 _____

5 _____ *Optional*



Examples

- "We offer unique, actionable insights **no one else has.**"
- "We have **proven tactics** to maximize home value or minimize buyer cost."
- "We serve a **niche market** with **custom-tailored solutions.**"

Step 3: Test Each Advantage

For each potential advantage, ask: can a competitor easily copy this? Will my client see me as one-of-one? Does it energize me and build confidence?

Testing Grid

Advantage _____

Uncopyable? One-of-one?

Does it energize me?

Notes _____

Advantage _____

Uncopyable? One-of-one?

Does it energize me?

Notes _____

Advantage _____

Uncopyable? One-of-one?

Does it energize me?

Notes _____

Advantage _____

Uncopyable? One-of-one?

Does it energize me?

Notes _____

Advantage _____

Uncopyable? One-of-one?

Does it energize me?

Notes _____

Once completed...

Bold the advantages that pass the test and feel most authentic and defensible.

Final Deliverable: Your Top 1–2 Competitive Advantages

Detail the bolded advantages that pass the test and feel most authentic and defensible.

My Competitive Advantages

1

2

Instructor's Notes

Go back to your Considerations List. Identify the items that most effectively leverage your Magnetic Brand's competitive advantages. Bold them. Next, strike through any items that undermine your competitive advantage.

You should now have deeper clarity into assets and opportunities that will lead to your Magnetic Brand disproportionately winning new clients relative to your competitors.

Wrap Up

What You've Built

You now have 1–2 **Competitive Advantages** that differentiate your Magnetic Brand from competitors in ways that are authentic, energizing, and hard to copy.

Instructor's Final Word

Push yourself. Don't stop at generic claims like "great service" or "trustworthy." Imagine you're building a mousetrap: what draws people in and keeps them in? The best competitive advantages are unique, energizing, and not easy to copy.

S e s s i o n 1 3

Presence

Purpose of this Session

Presence defines **where and how your Magnetic Brand shows up** in the world. It ensures you're in the right environments to maximize your magnetism and that you show up in ways aligned with the culture of those environments.

By the end of this session, you'll have:

- ✓ A list of 3–5 places where your people are concentrated.
- ✓ Notes on the culture of those places (what's respected, what's frowned upon).
- ✓ Two polished lists: Where to Show Up and How to Show Up.

Step 1: Recall Whom You Serve

Copy your Internal Statement (from Session 2).

Whom I Serve

I am magnetic to people who are _____

between _____ and _____ years old, making _____

per year. They are interested in me because _____

They found me via _____

and we resonate because _____

We first worked together because _____

and we continue because _____

Step 2: Identify Where Your People Are

Now, list 3–5 places where your people are most concentrated. Be specific (organizations, media outlets, communities, networks).

Where My People Are

1 _____ . They're here because

2 _____ . They're here because

3 _____ . They're here because

4 *Optional* _____ . They're here because

5 *Optional* _____ . They're here because

Examples

Exclusive Clubs → My people value influential networks.

The Arts → My people show sophistication and status through patronage.

Business Journal → My people keep up with market shifts.

Church → My people gather for spiritual alignment and community service.

Step 3: Define the Culture of These Places

For each place, **describe** the culture. Answer:

- What's respected?
- How do people build trust here?
- What's frowned upon?

Culture Notes

Place: _____

What's respected: _____

Trust is built by: _____

What's frowned upon: _____

Place: _____

What's respected: _____

Trust is built by: _____

What's frowned upon: _____

Place: _____

What's respected: _____

Trust is built by: _____

What's frowned upon: _____

Place: _____

What's respected: _____

Trust is built by: _____

What's frowned upon: _____

Place: _____

What's respected: _____

Trust is built by: _____

What's frowned upon: _____

Examples

Exclusive Clubs → Culture of class and drive; confidence respected, showiness frowned upon.

Business Journal → Culture of polish and play; deals happen casually, not aggressively.

Church → Culture of humility and service; consistency and volunteerism are rewarded, selling and ego are viewed as distasteful.

Presence Map

Where to Show Up (Placement)

1

2

3

4

5

How to Show Up (Posture)

1

2

3

4

5



Instructor's Note: Take a look at your Consideration's List and Strategic Action Plan. Identify any items that strongly align with your Presence Map. By now, you should be seeing a handful of items rise to the top of your lists. You should also be seeing some items that ought to be entirely removed. Potentially, in-light of this map, there are items that should be added to one or both lists.

Wrap Up

Why This Matters

Your **Presence Map** keeps your energy and resources focused.

The “**where**” list tells you where to place your Magnetic Brand.

The “**how**” list informs your Magnetic Brand’s posture when it shows up.

Instructor’s Final Word

Every marketing dollar and every ounce of energy should be filtered through your Presence Map. It ensures you’re not just showing up more—you’re showing up magnetically.

S e s s i o n 1 4

Communication

Purpose of this Session

Your Communication is your Magnetic Brand's expression + style—how it looks, feels, and speaks to the world.

By the end of this session, you'll have:

- ✓ Clarity on how people unconsciously and consciously experience your Magnetic Brand.
- ✓ Rules of thumb for ensuring your communication is magnetic.
- ✓ A **Brand Expression Brief** you can hand to creatives so your brand shows up consistently and authoritatively in every medium.



Communication Matters

People judge your Magnetic Brand at two levels:

- **Subconscious:** snap judgments, usually driven by design, vibe, look, and feel.
- **Conscious:** logical interpretation, usually driven by what you say and how you say it.

Both levels must align with your Magnetic Core.

Step 1: Guiding Principles

Keep these principles in mind for every piece of communication:

- You don't get a second chance to make a first impression.
- Design = Authority.
- Consistency = Trust.

Step 2: Explore the Four Levers of Brand Expression

Lever 1: Visuals & Design

How Magnetism Is Exerted: Logos, fonts, colors, layouts.

Rules of Thumb:

- Invest in professional design.
- Use a brand guide for consistency.
- Ask: "Does this look polished, magnetic, and aligned?"

High-level aspirations for my brand's Visuals & Design

(ex: modern, minimal, stark contrasts, OR vintage, ornamental, soft blend of colors)

Lever 2: Words & Messaging

How Magnetism Is Exerted: Clear, vivid, memorable language.

Rules of Thumb

- Write and speak with clarity and brevity.
- Great messaging is succinct, emotional, and powerful.
- If a client can't repeat it back, it's not clear enough.

What should my brand communicate to the world and how should it say it:

Lever 3: Multi-Sensory Cues

How Magnetism Is Exerted: Touch, texture, smell, and embodied experience.

Rules of Thumb

- Touch: focus on tactile experiences such as heavier paper, embossing, textures.
- Smell: focus on evocative smells from candles, flowers, baked goods, or other scents tied to memory.
- Dress: consider attire that matches your positioning (luxury, middle market, working class). Always clean, consistent, confident.

Where and how can my brand incorporate multi-sensory cues:

Lever 4: Personality & Tone

How Magnetism Is Exerted: The way your Magnetic Brand "sounds" in every channel.

Rules of Thumb

- Keep tone consistent everywhere (website, ads, service calls, disclaimers).
- Align tone with your Magnetic Core, Core Values, and your client's culture
- Consistency builds trust. Inconsistency feels fake.

If my brand were a person, how would people talk about him or her?

Step 3: Define Your Brand Expression

Complete these **prompts**:

1 My Magnetic Brand's **personality** is... (1-3 words)

2 My Magnetic Brand's **style** is... (1-3 words or mood board)

3 When my Magnetic Brand is done talking, I want people to feel... (1 word)

Step 4: Build Your Brand Expression Brief

Your Brand Expression Brief is your creative compass. It ensures consistency across everything from ads to swag to a full brand refresh.

Page 1: Brand Expression

Your Brand Expression Brief is your creative compass. It ensures consistency across everything from ads to swag to a full brand refresh.

Reference your prior work to fill in the blanks below.

● **Magnetic Core**

● **Personality**

● **Style**

● **Desired Feeling**

● **Multi-Sensory Cues**

● **Design Direction**

● **Consistency Guardrails**

Page 2: Mood Board

On this page or a Figma frame, copy/paste or sketch:

- Logos, ads, or visuals that inspire you.
- Competitors positioned near you.
- Colors, typography, or photography that feels aligned.

colors



Wrap Up

What You've Built

You now have a Brand Expression Brief—your creative compass. Done correctly, it ensures every touchpoint:

Feels **magnetic**.

Radiates your Magnetic Core.

Builds **trust**.

Inspires **enthusiasm** in both you
and your clients.

Instructor's Final Word

It's not about "looking pretty." Consistency and authority translate directly to magnetism. Magnetic communication happens when your brand looks, feels, and speaks with consistency and authority, attracting your ideal clients.

S e s s i o n 1 5

Review

Purpose of this Session

You've built every key element of your Magnetic Brand. Now it's time to zoom out, review all the pieces, and see how they fit together.

By the end of this session, you'll have:

- ✓ A complete overview of your Magnetic Brand.
- ✓ Clarity on how far you've come.

Step 1: Reflect on the Whole Picture

Complete these **prompts**:

- Which piece surprises you the most?

- How does this Magnetic Brand feel different from the "brand" you had before this course?

Wrap Up

What You've Built

You've zoomed all the way out to see the Magnetic Brand you've created:

Clear **values**, defined audience, and articulated value.

A **mission**, core, and strategy that align everything you do.

Instructor's Final Word

Before this class, your brand may have felt scattered, unclear, or hard to explain. Now you have a Magnetic Brand that communicates with consistency and authority, pulling your ideal clients toward you.

S e s s i o n 1 6

Operationalization

Purpose of this Session

A Magnetic Brand only matters if people experience it in the real world. This session converts all your work into an **Magnetic Brand Implementation Plan**—a roadmap that turns your magnetism into momentum.

By the end of this session, you'll have:

- ✓ Goals (financial, operational, personal).
- ✓ A vision for how your Magnetic Brand achieves them.
- ✓ Key actions to move forward.
- ✓ Opportunities to pursue.
- ✓ Three small steps to build immediate traction.



Vision Without Execution Is Delusion

This comprehensive Magnetic Brand Implementation Plan ensures your Magnetic Brand doesn't stay an idea... it becomes a lived reality.

Step 1: Set Your Goals

Write 1-3 goals for each category.

Be precise. You will measure your success toward these goals with objective data such as numbers, timelines, and milestones. Make sure your goals facilitate objective measurement.

Financial Goals

- 1 _____
- 2 _____
- 3 _____

Operational Goals

- 1 _____
- 2 _____
- 3 _____

Personal Goals

1 _____

2 _____

3 _____

Examples

- Financial:** Reach \$15M in annual revenue.
- Operational:** Hire an executive assistant this year.
- Personal:** Take weekends off, be home by 6pm.

Step 2: Vision Casting

For each goal, imagine how your Magnetic Brand helps you achieve it while staying true to your Magnetic Core.

Prompt: "What's the inspiring version of this goal? What's the minimum viable version?"

Vision Notes

Financial Goal: _____

Vision: _____

MVV: _____

Financial Goal: _____

Vision: _____

MVV: _____

Financial Goal: _____

Vision: _____

MVV: _____

Operational Goal: _____

Vision: _____

MVV: _____

Operational Goal: _____

Vision: _____

MVV: _____

Operational Goal: _____

Vision: _____

MVV: _____

Personal Goal: _____

Vision: _____

MVV: _____

Personal Goal: _____

Vision: _____

MVV: _____

Personal Goal: _____

Vision: _____

MVV: _____

Examples

Financial: Double our total number of leads from our referral partners. (MVV: Double referrals from our top partner)

Operational: Find an inside sales rep who fully owns our entire sales process. (MVV: Hire a third-party to handle follow-ups)

Personal: Never miss a school event with my kids. (MVV: Commit to free Saturday mornings)

Step 3: Plan Key Actions

Break each goal into **smaller steps** that can be scheduled and tracked.

Financial Goals

1 _____

2 _____

3 _____

Operational Goals

1 _____

2 _____

3 _____

Personal Goals

1 _____

2 _____

3 _____



- **Financial:** Meet with key referral partners, understand why they refer us, identify specific ways we can earn more of their business
- **Operational:** Draft a roles and responsibilities doc, draft a job description, identify candidates or TPS-es that are fits with my firm
- **Personal:** This weekend, start to enforce my Saturday morning “no work” policy, expand my no work blocks until my weekends are completely free

Step 4: Identify Opportunities

Complete these **prompts** to surface growth opportunities aligned with your Presence and Communication:

● I'm looking for partnerships that...

● I'm looking for tools that...

● I'm looking for services that...

● I'm looking for platforms that...

● I'm looking for events that...

● I'm looking to hire people that...

Step 5: Three Things in Three Days

Early momentum compounds. Choose three small, confidence-building actions you'll complete in the next 72 hours.

My 3 Things

Example

- 1. Schedule a call with my top referral partner.
- 2. Write down a high-level sales funnel map.
- 3. Block family events on my calendar.

Wrap Up

What You've Built

You now have a complete **Magnetic Brand Implementation Plan:**

Goals → Vision → Key Actions →
Opportunities → Immediate Steps.

Instructor's Final Word

Congratulations. You've not just imagined a Magnetic Brand—you've operationalized it.

Now it's time to get to work. Use everything you've worked on to deploy your Magnetic Brand. This is the moment you commit to moving your Magnetic Brand from being an idea to becoming an unstoppable force.

BUILDING YOUR

Magnetic Brand AI Strategist

Congratulations on completing the Magnetic Brand business transformation course!

This workbook isn't just a reference guide for you, it is also the key to unlocking your Magnetic Brand AI Strategist.

Inside these pages are the core elements of your brand—your Core Values, your client profile, your Magnetic Values, your mission, your Magnetic Core, your strategy, and more. Together, they form the DNA for your Magnetic Brand AI Strategist.

Here's what to do next:

- Upload your workbook to the AI Thought Companion and tell it you'd like to create your Magnetic Brand AI Strategist.
- The AI Thought Companion will review your workbook and use the work you've done to create a prompt which you'll use to set up your personalized strategist.
- Once it has created its prompts, the AI Thought Companion will guide you through the process of using the prompt to build your AI Magnetic Brand Strategist custom GPT.

Your Magnetic Brand AI Strategist is designed to help you make aligned decisions quickly, stay consistent, and scale your Magnetic Brand with clarity and confidence.



Thank you!

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