SJBA
South Jersey Business Association

BUSINESS PLANNING SERIES · WORKBOOK 09

Change With Purpose. Preserve What Customers Trust.

Established Business Rebrand Planning Workbook



A rebrand is broader than a new logo. This workbook helps you define the communication problem, protect recognition customers value, check legal and digital dependencies, and roll out changes in a controlled sequence.

INSIDE THIS WORKBOOK

02 Start with the communication problem
03 Audience and recognition evidence
04 Brand and offer audit
05 Scope decision matrix
06 Brand brief
07 Trademark, domain, registration, and ownership questions
08 Asset inventory and budget
09 Digital continuity map
10 Customer, staff, and vendor communications
11 Phased rollout and quality checks
12 Evaluation plan
13 Professional conversations and action plan
14 Official sources, About SJBA, and next steps

02 · PROBLEM DEFINITION

Start with the communication problem

Name what is not working before deciding what should change.

The communication problem in plain words

Business goal

Decision owner

Success measure

Target date

Why change now

WHAT IS PROMPTING THIS?

- [ ] Customers are unsure what we do
- [ ] Merger or ownership change
- [ ] Entering a new market
- [ ] Inconsistent materials
- [ ] Name no longer fits our services
- [ ] Visual identity feels outdated
- [ ] Naming or legal conflict
- [ ] Other: _____

NOTES

03 · RECOGNITION EVIDENCE

Audience and recognition evidence

Find out what customers already recognize and value before replacing it.

Evidence	Source	Date	What it suggests	Keep, change, or test

Valuable existing associations to protect

Assumptions still to test

NOTES

04 · AUDIT

Brand and offer audit

List every place the brand appears and note where it contradicts itself.

Touchpoint	Current name or message	Accurate today?	Contradictions	Action
Business name				
Tagline				
Service descriptions				
Website				
Social profiles				
Signage and vehicles				
Proposals and invoices				
Email signatures				
Online listings				
Phone greeting				

NOTES

05 · SCOPE

Scope decision matrix

Match the size of the change to the size of the problem. Renaming is one option, not the default.

Scope option	What changes	Cost (quoted)	Recognition risk	Fit with the problem 1–3
Messaging refresh				
Visual update				
Naming change				
Offer change				
Broader repositioning				

Chosen scope and reasoning

NOTES

06 · BRAND BRIEF

Brand brief

A short brief keeps designers, writers, and decision-makers working to the same criteria.

Primary audience

Useful difference (why choose us)

Proof that supports the difference

Tone

Accessibility requirements

How options will be evaluated

NOTES

07 · LEGAL AND OWNERSHIP

Trademark, domain, registration, and ownership questions

Record the questions and who answered them. A qualified attorney assesses clearance.

Availability is not clearance

An available domain name or business name registration does not mean a name is clear to use as a trademark. Ask a qualified trademark attorney before committing.

Item	Question	Source or professional	Checked	Finding
Trademark search				
Business name registration				
Domain names				
Social media handles				
Existing design rights				
Contracts that reference the name				
Licenses and permits under the current name				

NOTES

08 · ASSETS AND BUDGET

Asset inventory and budget

Confirm who owns each asset and whether editable files and usage rights exist.



Asset	Current owner	Editable files?	Usage rights verified?	Replacement scope	Quoted cost	Priority

09 · DIGITAL CONTINUITY

Digital continuity map

List verified existing addresses and accounts before changing anything. No plan can guarantee rankings or traffic.

Existing URL or account (verified)	Proposed change	Redirect needed?	Dependency	Implementation owner	Done

Dependencies to check: domain and email, online listings, analytics, payment and booking tools, and printed links or QR codes.

10 · COMMUNICATION

Customer, staff, and vendor communications

Explain what changes, what stays the same, and why, with evidence where needed.

Audience	What changes	What stays	Timing	Responsible	Approved
Customers					
Staff					
Vendors					
Lenders and insurers					
Licensing bodies					
Community and referral partners					

NOTES

11 · ROLLOUT

Phased rollout and quality checks

Records do not update themselves. Assign each item to a phase and check it once changed.

PHASES

01
Prepare
Assets and approvals

02
Internal
Staff and systems

03
Launch
Website and core materials

04
Physical
Signage and vehicles

05
Review
Check and correct

Item	Phase	Owner	Updated	Checked by
Website				
Proposals and quotes				
Invoices				
Email signatures				
Signage				
Vehicles				
Uniforms				
Printed materials				
Accounting and bank records				
Online listings				

NOTES

12 · EVALUATION

Evaluation plan

Set a baseline before launch. Many factors affect results, so treat changes as signals, not proof.

Measure	Definition	Baseline	Source	3 months	6 months

About attribution

Seasonality, pricing, staffing, and market changes also move results. Note other changes in the same period when reviewing these measures.

NOTES

13 · CONVERSATIONS AND ACTIONS

Professional conversations and action plan

Prepare for the next conversation, then turn decisions into owned, dated actions.

ROLES THAT MAY BE RELEVANT

- ☐ Brand strategist
- ☐ Graphic designer
- ☐ Trademark attorney
- ☐ Web developer
- ☐ Copywriter
- ☐ Sign company
- ☐ Printer
- ☐ Accountant

Conversation 1: professional role | **Name / company** | **Date**

Questions to ask

Documents to bring | **Recommendation received**

Action and owner | **Deadline** | **Follow-up date**

PRIORITY ACTIONS

#	Action	Owner	Due	Depends on	Done
1					
2					
3					
4					
5					
6					

Review cadence: _____ Next review date: _____ Visit SJBA to explore current professionals.

NOTES

14 · SOURCES AND NEXT STEPS

Official sources, About SJBA, and next steps

OFFICIAL SOURCES, CHECKED OCTOBER 2026

USPTO: Trademarks
Federal trademark basics, search, and registration. Clearance needs qualified review.
www.uspto.gov/trademarks

New Jersey Business Portal
State guidance on registering, licensing, and operating a business in New Jersey.
business.nj.gov

U.S. Small Business Administration
Federal guidance on planning, funding, managing, and growing a small business.
www.sba.gov

NJ Division of Revenue and Enterprise Services
Business formation, name registration, and employer registration records.
www.nj.gov/treasury/revenue

FTC: Business guidance
Federal guidance on advertising, claims substantiation, privacy, and consumer protection.
www.ftc.gov/business-guidance

New Jersey Small Business Development Centers
No-cost confidential advising and training for New Jersey businesses, with centers serving South Jersey.
www.njsbdc.com

Companion article: "Rebranding an Established Company." Find it with SJBA's business resources at southjerseybusinessassociation.org.

SJBA Inc. South Jersey Business Association

About SJBA

Founded in 1994, the South Jersey Business Association is a structured, category-exclusive referral network for South Jersey business owners serving Camden, Gloucester, and Burlington counties. Members hold one seat per professional category and follow attendance and referral standards.

Visit SJBA to explore current professionals

Established business owner? Visit a Meeting

Planning note. This workbook is general educational planning information for South Jersey business owners. It is not individualized legal, trademark, marketing, or financial advice. Requirements vary by municipality, industry, and business; qualified professionals and the relevant authorities should confirm applicable decisions. SJBA does not perform, supervise, or guarantee the work of any member or other professional. Rules change; confirm details with each source. Photos are illustrative, not SJBA members or member projects.