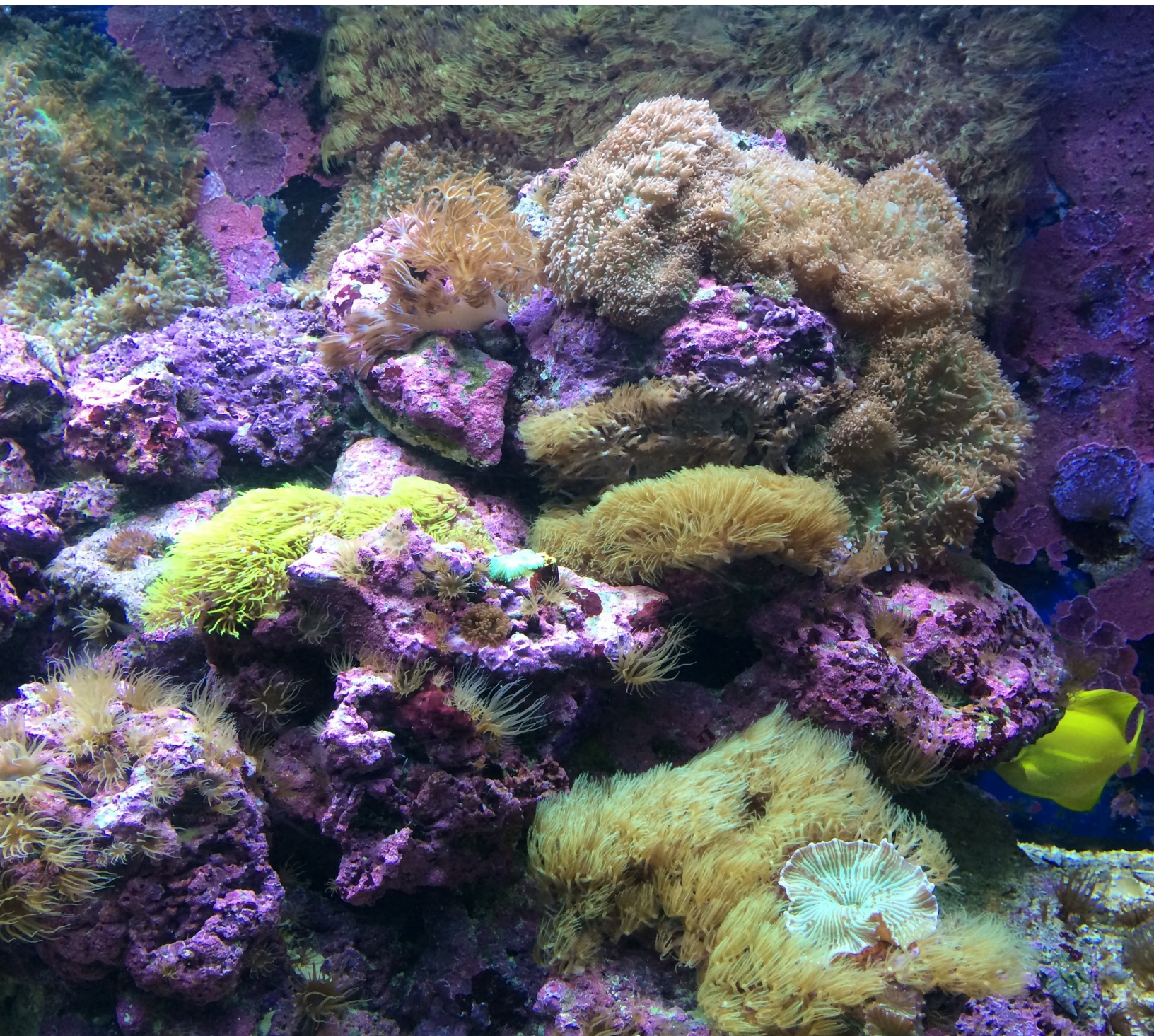


Diving Deep to Find a Brand's Distinction

How Spencer Brenneman helped GAGNONtax become the brand it was meant to be.

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The Journey of GAGNONtax

*"Before, I bet you
that if you asked
each one of our
partners to
describe what we
did, you wouldn't
get the same
answer twice."*

Bill Gagnon
GAGNONtax CEO

INTRODUCTION

Picture it. It was the mid-1990s, and the accounting world had a mere six choices for any company looking for the best in tax strategy. After a merger of two and the collapse of one, these six would eventually become "The Big Four," but their accessibility then, and now, created a market opportunity.

William Gagnon was one of the very first to seize the opportunity. So, he left what is now PwC to start GAGNONtax, a smaller firm designed to bring the same level of talent and expertise of "The Big Four" to companies large and small, inside and outside of Massachusetts, where the firm is based.

In the beginning, it was a challenging sale because there were few, if any, firms the size of what was then called The Gagnon Group. The market wasn't sure about leaving "the big guys." However, it didn't take Gagnon long to persuade clients that a firm like his could do much of the work larger firms did, at a fraction of the cost.

It took a while for competitors to catch on to the opportunity, but by 2017, many certainly had. It was clear that it was time for GAGNONtax to update its brand and positioning. Plus, the firm was ready to market its proprietary provision software to the broader tax accounting market. Therefore, technology had to become a clear part of their brand messaging.

That's when Gagnon and Head of Product Management Kathleen Keenan turned to Spencer Brenneman for help.

"We selected Spencer Brenneman because it was clear their expertise in branding was built atop years of experience in professional services and technology," says Gagnon. "Plus, their model is a lot like ours: small but well-credentialed and able to bring the benefits of working with a large firm to brands of all sizes."

GAGNONtax needed Spencer Brenneman to:

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- Articulate their brand positioning
- Update their visual identity
- Create a naming architecture for their product offerings
- Write and design a website that delivered SEO

Here's how it all went down.

ARTICULATING THEIR BRAND POSITIONING

Like most organizations that are almost two decades old, GAGNONtax and the markets they serve have changed since their beginnings. As a result, it gets more and more difficult to explain what you do when those changes happen gradually, over time.

"I bet you that if you asked each one of our partners to describe what we did, you wouldn't get the same answer twice," Gagnon said at the beginning of the process.

That's not uncommon, at all, says Spencer Brenneman President Douglas Spencer.

"When people are nose to the ground, cranking out exceptional work, it's almost impossible to note changes and integrate them into a brand narrative, so it's always up to date. GAGNONtax was certainly not alone in the position they found themselves," Spencer says.

The GAGNONtax team was committed and clear; they wanted Spencer Brenneman to dig deep and unearth the firm's true personality. That meant interviewing partners, employees, clients, and even professionals who had chosen not to work with the firm (although, to be honest, they were hard to find). Spencer Brenneman Brand Strategist Kerry Wall conducted the interviews.

"What was striking from the interviews was how consistently

clients raved about the personal touch they felt they received when working with GAGNONtax," Wall says. "The other consistent finding was that clients knew they were getting the same caliber of advice from GAGNONtax as they would from The Big Four but with fewer layers and smaller invoices."

Together, Wall and Spencer presented the findings to GAGNONtax senior management and conducted a workshop to hone in on the core elements of the GAGNONtax brand:

- Why they do what they do
- How they do what they do differently from anyone else
- Which characteristics best describe the brand

With those elements in place, it was time to create a visual identity that was true to GAGNONtax's brand and stood out from all the other options customers had.

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Douglas Spencer, President & Chief Brand Strategist

UPDATE THEIR VISUAL IDENTITY

The unique and diverse attributes of the GAGNONtax brand proved to be very different from other tax firms, so much so that this rebrand felt more like giving a visual identity to a newfound genre.

Spencer Brenneman went to work on creating GAGNONtax's identity in uncharted territory, paving the way for a clearer and more concise brand personality in the process.

Senior Art Director Kim Vanni spearheaded the graphic design work, beginning with creating a new color palette to indicate the uniqueness of GAGNONtax immediately.

The GAGNONtax team knew they had to take a big leap, although they knew at first it might make them a bit uncomfortable. Vanni designed the palette to be bold and fresh, with the unexpected primary colors of green and ultraviolet to meet specific strategic goals as well as bring the GAGNONtax brand to life.

The team quickly gravitated to the colors, especially the ultraviolet, and the foundation of the brand's visual identity was formed.

The GAGNONtax team knew they had to take a big leap, although they knew at first it might make them a bit uncomfortable.

A NEW LOGO



The GAGNONtax logo before.



The GAGNONtax logo after.

"The brand needed to stand out, and ultraviolet does this without exception," Vanni says. "It beautifully imbues the creative and charismatic attributes of the brand, while the green offers a professional balance and underscores the pragmatic and perceptive personality attributes."

The secondary colors of saffron, water blue, and grays complemented and calmed the energies of the primary colors to reinforce the brand's approachability, pragmatism, and professionalism, while still using a creative combination of colors.

Using a friendly, curved typeface and a juxtaposition of the primary colors, Vanni designed the GAGNONtax logo to ensure that the name is read as two words, yet one unit. To round out the logo, she combined the wordmark with an icon that shows the interconnectedness of a process, mirroring GAGNONtax's brand promise that their work "starts and ends with people, working creatively to confidently solve their tax challenges."

The research that Spencer Brenneman conducted found that GAGNONtax clients feel comfort and assurance under their care, so it was important to give life to this brand trait.

Vanni developed a unique, custom treatment for photos that drew focus to the area within the image that most strongly exemplified the GAGNONtax brand in action.

The noise and distraction of a busy office were illustratively "stripped away" via the creative use of textures and gradients.

Supporting graphics, using the full-color palette, were expressive and lively, yet clear and on-point.

Having mapped out GAGNONtax's new visual identity, the next step was to establish a naming architecture for the wide array of products and services that they offer.

A NEW COLOR PALETTE



The brand needed to stand out, to show clear distinction from our competition. GT Ultra Violet does this better than any other color. It also beautifully imbues the creative and charismatic attributes of the brand.



GT Green offers a professional balance to the GT Ultra Violet while it underscores the pragmatic and perceptive personality attributes.

IMAGE LIBRARY



The new image library had to deliver distinction and use stock photography that didn't look like stock photography.



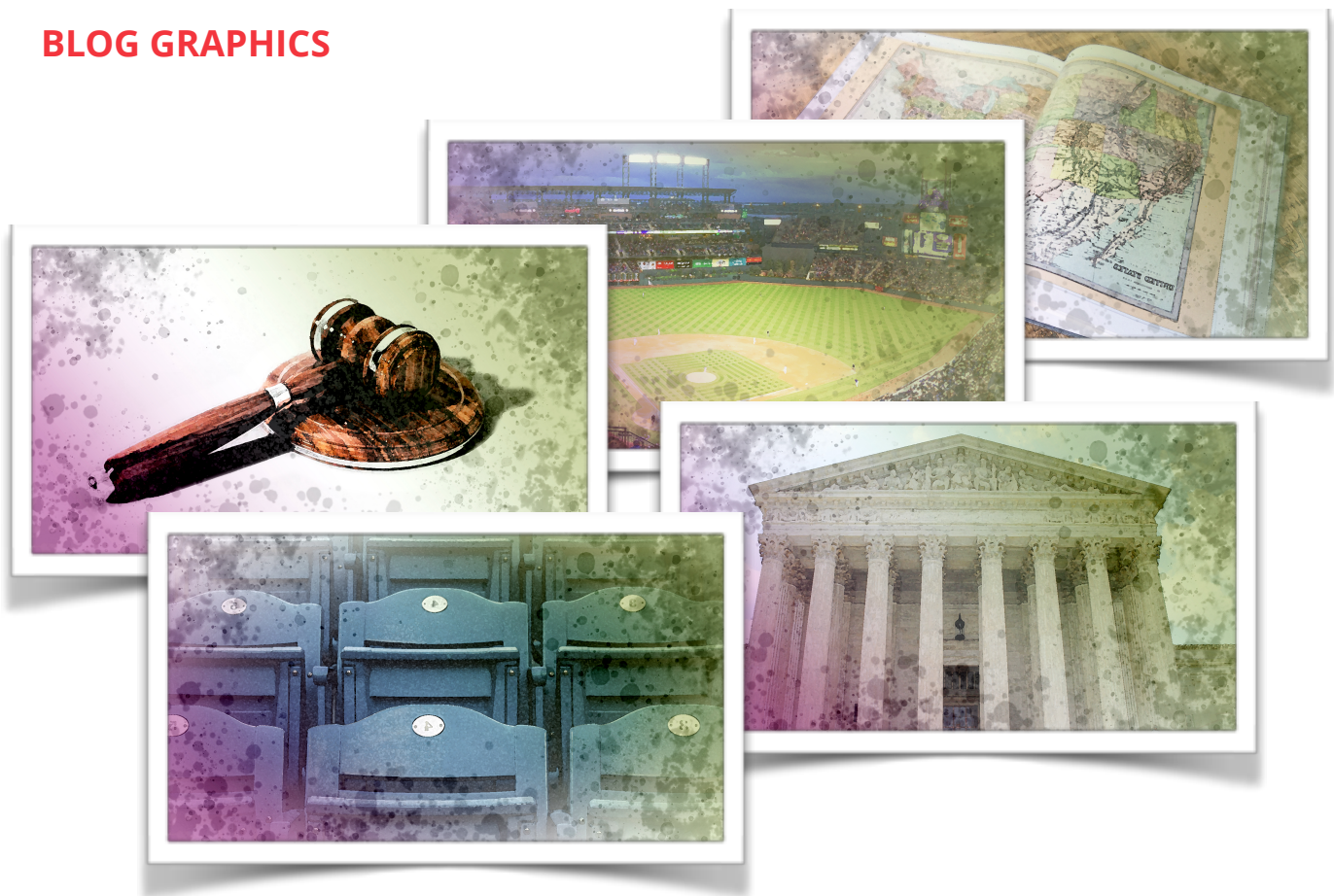
TRADE SHOW BANNERS & FLIERS



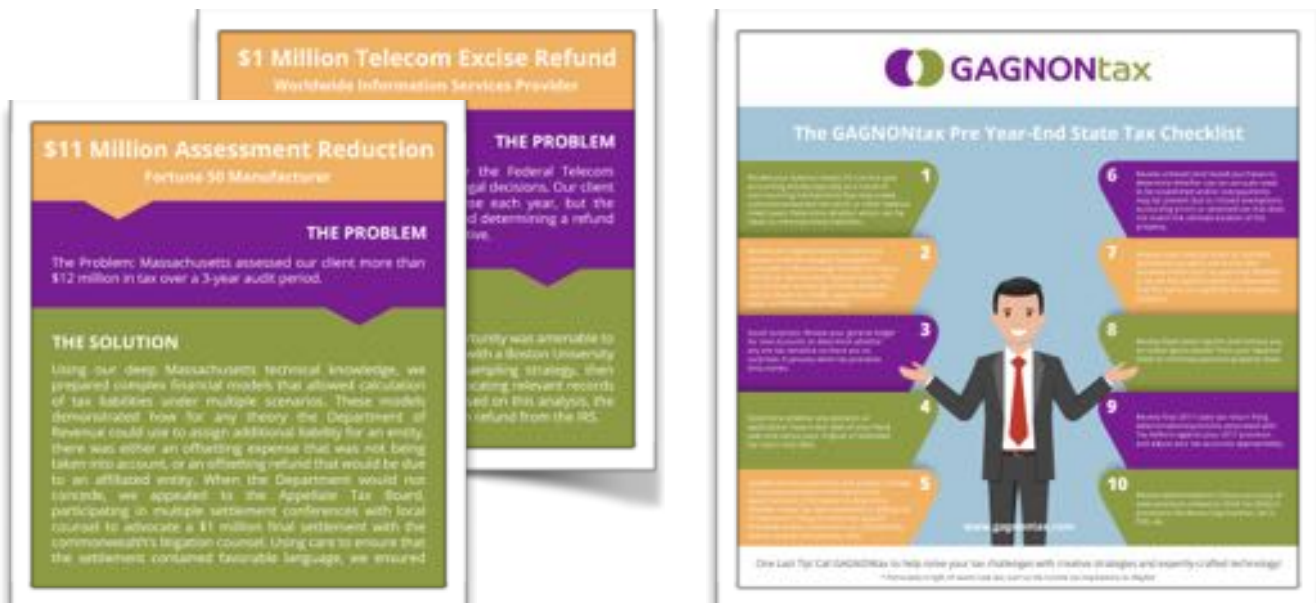
PRESENTATION TEMPLATES



BLOG GRAPHICS



INFOGRAPHICS



There are many ways to tell a brand's story: A key part of the GAGNONtax story is beautifully told through their product naming architecture.

CREATE A NAMING ARCHITECTURE FOR THEIR PRODUCT OFFERINGS

There are many ways to tell a brand's story: through words and images, certainly, but also through naming. A key part of the GAGNONtax story is beautifully told through their product naming architecture.

GAGNONtax delivers two crucial components to any business: tax strategy and tax technology. In fact, it's impossible to have one without the other. Even the best tax strategy will suffer without the right technology to execute it. Likewise, tax technology that runs outside the context of a strategy is just wheels spinning, going nowhere.

From there, the "Gs" and "Gt" suffixes were born! Adding Gs after the two core offerings of consulting and compliance makes it clear that everything GAGNONtax does is done with a specific **strategy** in mind. The use of Gt helps communicate that **technology** isn't just an

afterthought of an offering, but a core part of how GAGNONtax approaches servicing their clients.

WRITE AND DESIGN A WEBSITE THAT DELIVERED SEO

Just as a tax strategy needs technology to make it work, a brand strategy needs words and a place to live for it to work. Enter, the new GAGNONtax.com.

Business development isn't much of an issue for GAGNONtax because their client retention and referral rates have been strong for years. That's why their web presence did not receive all the attention it deserved. Now, however, GAGNONtax has recommitted their energies to the website, because it does more than simply serve as a virtual shingle. It demonstrates true thought leadership through a new blog and invites interaction with the broader tax community.

Once the visual and verbal identities were in place, Vanni

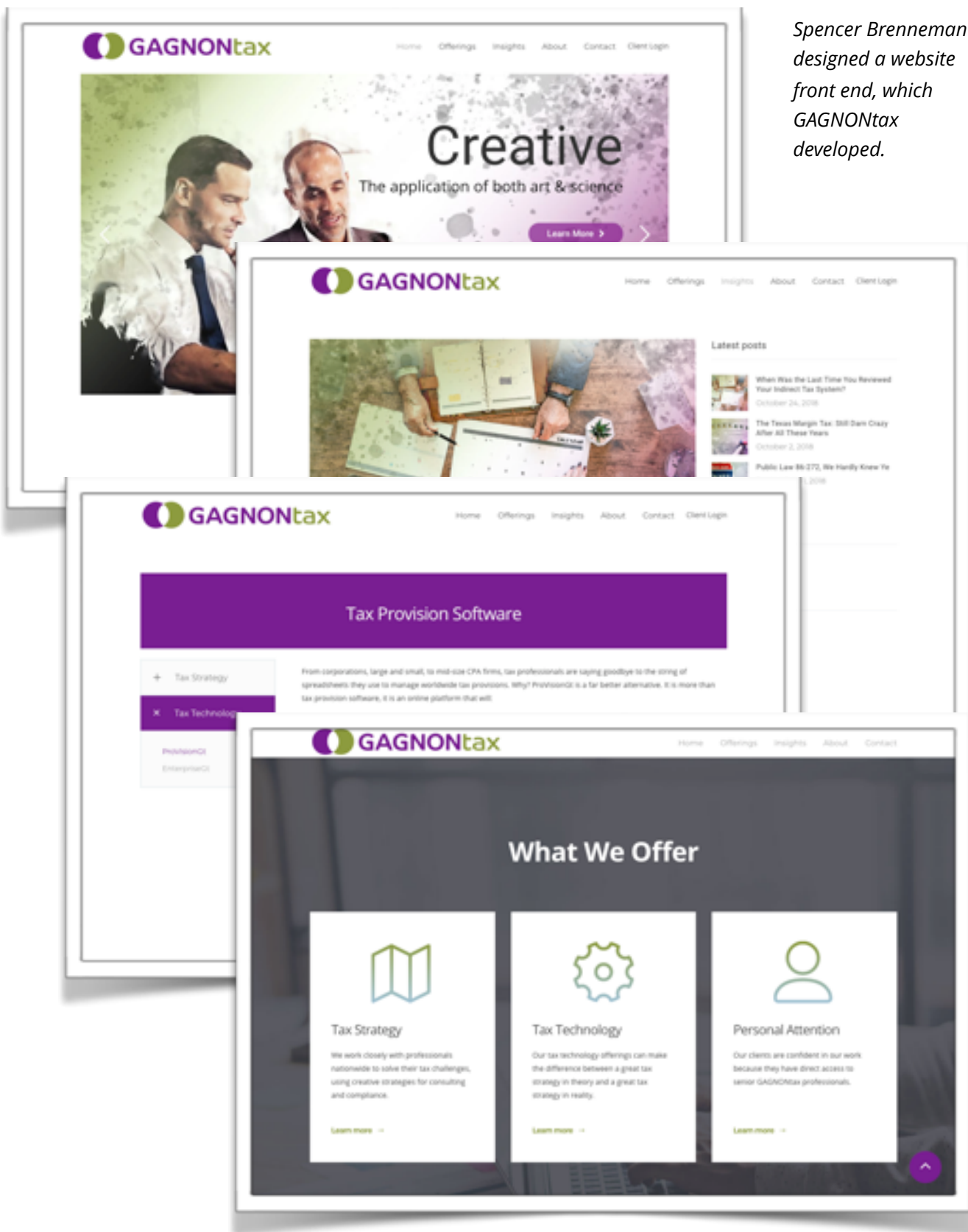
and Spencer got to work on each, respectively. Spencer Brenneman also brought in a top-notch SEO expert to guide the content development so the GAGNONtax offerings, particularly the newly launched ProVisionGt, are easily found. From there, they worked collaboratively with GAGNONtax's web developer to produce the new site.

"Working with the Spencer Brenneman team on our rebranding throughout the entire project was a great experience," Keenan says. "They were organized, responsive, and always willing to go way beyond what was expected when necessary."

CONCLUSION

With a new brand strategy in place, an incredibly unique, competitive, and differentiated visual identity, and a new website, GAGNONtax is ready to continue "working closely with professionals nationwide to solve their tax challenges, using creative strategies and expertly-crafted technology."

A NEW WEBSITE



Spencer Brenneman designed a website front end, which GAGNONtax developed.



spencerbrenneman.com



Spencer Brenneman, LLC

50 Milk Street
Boston, MA 02109 USA
+1-774-214-9933

