



RVAMPP CASE STUDY

Summit Financials - Revamping Brand Identity for a Modern Financial Services Firm

Service Used:
Brand Continuity Service Package

THE COMPANY

“Summit Financials” (a pseudonym to preserve confidentiality) is a financial services company that has evolved from a traditional consultancy, formerly known as Summit Financial Advisory, to a comprehensive provider offering lending, investment projects, and financial technology solutions. The company sought to reposition itself in the financial industry, strengthening its brand to reflect a new era of growth and innovation.

HOW WE WORK



Discovery & Brand Audit

Conduct a thorough assessment of the existing brand assets, gathering insights on the current state and identifying areas for alignment.



Strategic Plan Development

Craft a detailed action plan that includes updated visuals, document standards, and brand messaging to create consistency across all materials.



Implementation & Training

Implement updates across all channels and documents, with brand training sessions to ensure all employees and partners communicate the brand effectively.

OVERVIEW

The rebranding project for Summit Financials involved a comprehensive brand continuity strategy to ensure that all organizational documents, from marketing materials to internal resources, accurately represented Summit’s new identity. We worked to align Summit’s logo, typography, color schemes, and brand voice across its entire portfolio. With refreshed visuals and templates, Summit Financials was able to confidently communicate its expanded service offerings and reach a broader audience.



Client Engagement:
75% increase in partner referrals within six months post-rebrand.



Consistency Rate:
90% alignment across all client-facing and internal materials.



Employee Adoption: 85% of employees reported improved understanding of the brand’s message.



Time to Implementation: Project completed 20% faster than the projected timeline.

Results may vary as each case is unique. These metrics reflect the outcomes for this specific project and may differ based on individual company needs and circumstances.



PROBLEM IDENTIFY

As Summit Financials expanded its service offerings, it faced challenges ensuring a cohesive brand message across all platforms and documents.

- **Inconsistent Brand Assets:** Old logos, color schemes, and designs clashed with Summit's new identity.
- **Disparate Document Formats:** Outdated templates and varied formatting created confusion for both clients and employees.
- **Partner Confusion:** Partners struggled to communicate Summit's new services effectively without updated materials.

SOLUTION

Rvampp Brand Consulting implemented the Brand Continuity Service Package to unify Summit's brand across all platforms, documents, and communications.

- **Brand Asset Revamp:** Updated logos, color schemes, and visual elements for a cohesive look and feel.
- **Document Standardization:** Created standardized templates to ensure every document reflected Summit's new brand.
- **Partner-Focused Printables:** Developed clear, updated materials for partners to confidently refer clients to Summit Financials.

CHALLENGE

One of the significant challenges faced during the project was adapting Summit's extensive repository of legacy documents without disrupting their legal or compliance-related content. These documents were ingrained in the company's operations, yet required visual and tonal adjustments to fit the new brand identity. Collaborating closely with Summit's legal and compliance teams, we meticulously ensured that each document maintained its integrity while reflecting the updated brand image. This collaborative approach allowed us to revitalize Summit's materials without compromising on regulatory standards.



RESULT

Summit Financials, previously known as Summit Financial Advisory, embarked on a rebranding journey to reflect its expanded services in lending, investment projects, and financial technology. With outdated documents and inconsistent brand materials creating challenges, Summit partnered with Rvampp Brand Consulting to implement the Brand Continuity Service Package. This comprehensive solution involved a three-step process of auditing, planning, and implementing brand updates, ensuring cohesive visuals, tone, and messaging across all materials without altering legal content. Despite the challenges of updating extensive legacy documents, the project successfully increased partner referrals, achieved high consistency across all touchpoints, and empowered employees with a clear brand understanding. This rebrand transformed Summit's image, enabling them to present a unified, professional identity that resonated with partners, clients, and staff alike.



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