

The Ultimate Checklist for Building a Scalable Fintech Brand



**GREEN
BULL**

Building a Scalable Fintech Brand

In order to build a scalable fintech brand, it's essential to establish your brand design system. This system is not just a collection of visual elements but a strategic framework that ensures consistency, scalability, and adaptability across all customer touchpoints.

The following checklist outlines the key components and processes that should be built into your brand design system to support long-term growth and success.

CREATE THE BASIC BUILDING BLOCKS

Build a scalable fintech brand, starts with the fundamental building blocks: a comprehensive logo system, a versatile set of colors, a defined type system, brand patterns, charting and icon libraries. These assets form the foundation for consistent branding across all platforms, ensuring uniformity in how the brand presents itself visually.

Logo system

- Design logo variations for different use cases
 - Primary/main logo
 - Secondary logo
 - Square version of logo
 - Tall version of logo that fits in tall, narrow space.
 - Horizontal version of the logo designed for short, wide spaces.
- Create and export different logo sizes
 - Small
 - Medium
 - Large
 - App Icon
 - Favicon
- Create package of logos in different colors and file formats (PNG, SVG, PDF)
- Create documentation for logo usage



Color system

- Brand colors (3-5 colors)
- Neutral tones (11 shades of gray)
- interactive colors (Colors to represent success, warning, error, and links)
- Ensure colors are accessible and compliant with industry standards
- Document color guidelines and share with team members

Type system

- Select font families that align with your brand's personality
- Develop a type hierarchy for headings, body text, and other typographic elements
- Establish responsive typography guidelines for different screen sizes

Brand patterns

- Create unique patterns that reflect your brand's themes or motifs
- Use patterns consistently across all brand materials to reinforce brand identity
- Create templates for documents and presentations that other team members can use

Icon library

- Design/purchase a set of icons that communicate actions/concepts
- Ensure icons are scalable and recognizable at different sizes and work on website and product UI

Charting library

- Develop a library of charts & graphs that align with your brand's visual identity
- Ensure these elements are easily customizable for different data sets

CENTRALIZE BRAND ASSETS

All brand assets, including design templates, guidelines, and creative materials, should be housed in a centralized repository accessible by team members. This makes it easier to maintain consistency, enabling faster, more efficient creation of new assets that stay on-brand while ensuring all stakeholders are aligned.



Create centralized guidelines, libraries and templates

- Develop and share brand guidelines that outline the proper use of all brand assets
- Store all brand assets (logos, colors, typography, patterns, icons) in a shared digital repository
- Ensure assets are organized and easily searchable
- Create libraries in Figma, Adobe, GSuite, or any other software your team uses
- Create and distribute templates for common use cases (e.g., presentations, social media posts).

Enable customization

- Allow teams to create “flavors” or variations of brand assets for specific needs while ensuring they remain on brand.
- Set up approval processes for any significant customizations to brand design system

Advanced brand management and ownership

- Incorporate advanced brand management tools like Digital Asset Management (DAM) systems or specialized brand management software.
- Designate a person or team responsible for maintaining and evolving the brand design system.
- Define clear lines of communication and approval processes for brand related decisions.

SHARE AND EDUCATE

Share your brand assets with both internal teams and external partners to create a cohesive brand experience across touchpoints. This includes providing press kits for media, sharing brand guidelines with partners, and ensuring internal teams are educated on how to effectively use the design system to create new materials that reflect the brand's identity.

Share with external partners

- Publish a curated set of brand assets with external stakeholders (e.g., press kit for media, assets for partners and investors).
- Develop specific guidelines for external use to protect brand integrity.



Internal Sharing

- Distribute brand assets to all relevant team members with clear usage instructions.
- Provide training or resources on how to use brand assets effectively.
- Educate team members on the importance of brand consistency and how it impacts the company's success.
- Encourage team members to take ownership of the brand in their daily work.

EVALUATE, REFINE, AND EXPAND

Brand design systems should live and evolve alongside your company. Regularly evaluate the effectiveness of your design assets, track analytics on their usage, and gather feedback from internal teams and external users. Create a process for adding, refining, or removing elements to ensure the brand system remains flexible, efficient, and relevant as the company grows.

Gathering Feedback and Audits

- Conduct regular audits to review how brand assets are being used across the company.
- Identify inconsistencies and areas for improvement.
- Gather feedback from internal teams and external stakeholders on the effectiveness of the brand assets.

Create Process for Adding New Assets

- Establish a process for proposing and adding new assets to the brand design system.
- Ensure new assets align with the overall brand strategy before implementation.
- Conduct usability testing to verify that brand elements contribute to a seamless and intuitive user journey.

