# Check-Out™
## PLANNING SERVICES LTD

# BRAND
# MANUAL

How would *you* like
to be remembered?

Version 1.1

# Contents

# Defining the Brand

Within this brand manual, we define who and why we exist. What's more, we explore how we help people and their families prepare for the single largest milestone of their lives... And, how our brand strives to communicate our products and services to the world.

# 1.1 Who We Are

We are team of people who have all experienced the loss of loved ones. Although we built the CheckOutPlan platform to help families discuss and plan end-of-life events, we are also about celebrating all those lives well-lived.

**Our mission** is to help people support their families when they need it most by leaving a comprehensive end-of-life plan, providing guidance though this most difficult time. And, to  help our members live on through the memories and experiences they've shared using the Check-Out platform.

**Our vision** is a world where the passing of loved ones is made easier for those left behind.

Please use "Check-Out" (as in the company) as an adjective. It is the name of our company and should not be used as should not be used as a verb, or plural. The Product produced by the service we provide is called a "CheckOutPlan" to be used only as a noun followed by a description of our services or the benefits therein.

# 1.2 Describing the need for Check-Out

### Challenge
When people pass away today, their families have no idea what they would have wanted. As a result, those families are forced to navigate through a very complex process without any guidance and while under incredible stress. Even current wills do not provide the level of detail required.

### Solution
Check-Out provides a way for people to collaboratively discuss, build and share a guide to their last wishes. They can effectively define how they would like to be remembered, and can provide the materials to realize that vision.

### Result
A CheckOutPlan helps families avoid conflict, save money and to remember their loved ones in the manner they wanted to be remembered.

# 1.3 Brand Values

**Empathy**
Understanding. Sympathy. Hope.
Guiding people to instruct others in a way that is not commonly done at this time. Reflecting on our own challenges related to the passing of someone dear and the difficulties we experienced as a result. Being the best humans possible.

**Community**
Kinship. Belonging. Respect.
We strive to treat our subscribers as family. We seek to help them build and share a plan that helps their families just when they need it most.

**Craftsmanship**
Confidence. Craftsmanship. Attention to Detail.
A respect for what we have built and its ability to truly help our members communicate their vision. Knowing that we have spent to time and care to build an environment where we can all thrive.

**Lightness**
Warm. Inviting. Brave!
To shed light on a difficult subject matter and to help process the fear that comes with acknowledging our mortality.

**Support**
Care. Solidarity. Connection.
Between our members and as a team, we strive to help all rise above their difficulties. Whether on the Support Line or in team meetings, we can all make a difference by our actions and words.

**Worth**
Value. Support. Honor.
To ensure that our customers receive excellent value for the money spent. To support them at all times to the very best of our ability.

# 1.4 Voice and Tone

Check-Out strives to speak directly to our customers in voice that makes us instantly recognizable...
And welcome.

We are equals. Our tone reflects both our willingness and ability to help the people using our services and products. We speak directly to them in a bright and personable way, but never assuming we know more than they do.

We are different from other website services in that we address our users using warm and friendly language that is easily understood.

To this end, we avoid using tech jargon or any language that makes our users feel like we are above them. Rather, we are equals.

Our users are part of our community. And so, we speak to the user as though they are in the room with us. As if they were close friends we hadn't seen in years. As though they truly matter. We are equals.

# 1.4 Voice and Tone

## What Are and What We're Not

- Professional (but never condescending)

- Respectful (but never weak)

- Authentic (not phony, but real)

- Friendly (but never ingratiating)

- Intelligent (just like our users)

- Witty ( but never disrespectful)

- Talkative as Needed (but not overboard)

- Accurate (but never overwhelming

It is through the window of shared experiences that we listen to our users and create a thoughtful environment that helps them communicate, build and share their wishes and memories.

When speaking to our audience, we are clear and concise. In writing, our voice is warm, direct and clear. We communicate with confidence, strength and clarity.

Above all we communicate as humans first and as SAAS providers second. We want our users to feel welcome, valued and supported.

# 1.6 Nomenclature

This is the correct phrasing to use when referring to our product or company:

**Check-Out**™
PLANNING SERVICES LTD

When referring to **the company,** the proper phrase is **Check-Out Planning Services Ltd.**

**CheckOutPlan**™

When referring to **the product,** the proper phrase is **CheckOutPlan.**

NOTE; Both logos/phrases are trademarked

Website address (note typesetting):

CheckOutPlan.com

Not www.checkoutplan.com

Incorrect usage for product:

Check-Out Plan or checkoutplan

Example: Building your Check-Out Plan is easy

# 2.0 Design Elements

These are some of the tools we use
to tell our story.

# 2.1 Checkmark of Progress

Historically, the check-mark symbolized either approval or is used to denote of a task completed.

The intent of the circles inside and outside the check-mark signify the circle of life.

Our users often strive to live on through the memories and experiences they record in their own CheckOutPlan.

The symbol is legible at most sizes, and is particularly versatile in small sizes.

The "Checkmark of Progress" symbol is a registered trademark and when used alone, must also feature the trademark (TM) symbol.

# 2.2 Our Logo

The Check-Out logo and its variations are used to communicate the brand at a glance. Consisting of the "Check-mark of Approval" in a banded circle. All logos are available in color, black, horizontal, vertical (stacked), and reverse in JPEG, PNG, EPS file formats.

**Primary Logo**

This horizontal logo is the primary version and should be used in most instances.

The stacked or vertical logo is for use when large-scale use is needed.

Always use the official Check-Out logo files provided. Never attempt to re-create our logos.

# 2.3 Logos - Variations + LogoMarks

Versatility is essential for any brand mark. The Check-Out logo has several different versions specific to different applications.

**Logos - No Tag**

This logo drops the corporate descriptor. To be used to support several mentions on a single page or screen.



CKO_Logo_Horz.jpg



CKO_Logo_Vert.jpg

**LogoMarks**

The Check-Out logomark can be used when a singular icon is needed. The trademark symbol must accompany the icon in all uses.



CKO_LogoMark.jpg



CKO_LogoMark_Blk.jpg

# 2.4 Logos - Product

Check-Out is not only a service, but also a product. This product is represented here in a variety of formats.

### Product Logo

Use this logo when referring specifically to the completed product, which is referred to as a CheckOutPlan.



CKO_Logo_Product.jpg

### URL Logo

Since Check-Out's products and services are delivered online, we've created a logo for use when speaking specifically to our platform.



CKO_Logo_URL.jpg

# 2.5 Logo Usage on Backgrounds

The full-color logo should only be used on white, slate or grey. Do not use the full-color logo on images unless the logo sits on a "quiet" dark or light area of the image.

1. Logo on white background

2. Logo on dark background: If desired, use the "Vari" logo which offers a transparent band around the logomark instead of the classic white ban as shown in example 3.

3. In neutral settings, the primary logo with dark letting should be used, using the white-banded logomark.

1.

2.

3.

# 2.6 Logo Misuse

Do not use drop shadows or any other effects

Do not change the relationship of elements to each other

Do not change the transparency of the logo

Do not use different colors

Do not distort the logo

Do not rotate the logo

Do not re-create using any other typeface

Do not outline the text

# 2.7 Icons

Iconography is used through the CheckOutPlan website and portal to help our users identify things quickly and easily.

**The Office**

Section 1
**Having "The Talk"**

Section 2
**About You**

Section 3
**Build Your Team**

Section 4
**Taking Stock**

Section 5
**The Big Event**

Section 6
**Making Memories**

Section 7
**Making Memories**

# 2.8 Colors

**Primary Colors:** The Check-Out brand employs a bright, fresh palette to communicate light, life and hope. Check-Out branding also uses lots of whitespace wherever possible.

### Check-Out Blue
This is the key brand color for Check-Out. It is fresh and with a subtle hint of green feels almost turquoise. Clean and yet warm.
RGB: R91 / G207 / B213
Pantone:  #319 /  RGB:  R45 / G204 /B211  H: #5bcfd5

Custom          Pantone

### Check-Out Slate
Check-Out Slate provides the base for the logo and is a warmer touch than black.
Pantone: #432
RGB: R252 / G163 / B102  H: #333e48

Pantone          RGB

### Check-Out Orange
While the orange is used sparingly and provides a contrast to our signature blue
Pantone: #7410
RGB: R252 / G163 / B102  H: #fca366

RGB          Pantone

**Complementary Colors:** These additional colors are used to support the primary brand colors.

■ **Check-Out Warm Violet**
This is the key brand color for Check-Out. It is fresh and with
a subtle hint of green feels almost turquoise. Clean and yet warm.
RGB: R138 / G132 / B214
Pantone:  #2715 /  H:  #8a84d6

Pantone

■ **Check-Out Very Berry**
Check-Out Slate provides the base for the logo and is a warmer touch
than black.
Pantone: #7647
RGB: R172 / G60 / B114 / H: #ac3c72

Pantone

# 2.9 Fonts

## Open Sans

This is our primary font. It has several advantages: It is clean, easy to read, web-friendly and free.

Light
*Light Italic*
Regular
*Regular Italic*
**Semibold**
***Semibold Italic***
**Bold**
***Bold Italic***
**Extrabold**
***Extrabold Italic***

Note: Lato can be used as a substitute when needed.

Open Sans - Light
All work and no play makes a dull dude

Open Sans - Regular
All work and no play makes a dull dude

*Open Sans - Italic*
*All work and no play makes a dull dude*

**Open Sans - SemiBold**
**All work and no play makes a dull dude**

**Open Sans - Bold**
**All work and no play makes a dull dude**

# 2.9 Fonts - Typography

## How We Like It

### Font Size
Because of our demographic, a generous size is needed for all body copy. Our minimum is 11-12pts.

### Leading & Kearning
For the same reason above we want body copy to be very readable. So, +4pt leading and 0 kerning when using Open Sans and 20 when using Lato.

### Case
We steer away from using all-caps and prefer title or sentence case instead. No need to shout!

### Use of Periods
If they do not form complete sentences, do not end with a period. This includes titles and headings.

# 3.0 Details

Just a few more details to note...
This is an outline of image use, how we
name files and a bit on nomenclature

CKO

# 3.1 Images

Check-Out's brand is also represented by a variety of carefully selected images. We depend on these images to reflect a happy, supportive vibe by featuring diverse people within our primary demographic. We celebrate life and promote managing uncertainty.



Although the subject matter of Check-Out deals largely with end-of-life planning, tend away from showing sad people or distressing images.
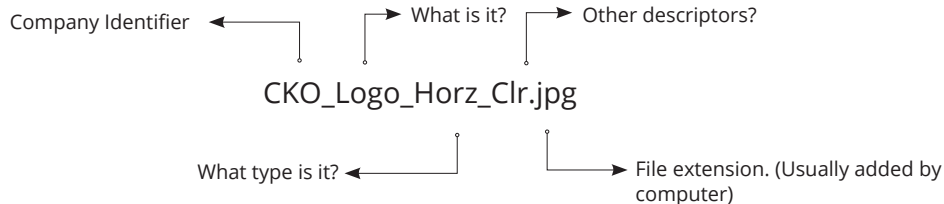
# 3.2 Naming Conventions

Consistent file naming or naming conventions are used to promote easy file identification and searching. We use "CKO" as the company identifier and all file names should begin with this.

Instead of:  **Logo.jpg**



Use this:     **CKO_Logo_Horz_Clr.jpg**

Company Identifier ←       What is it? →      Other descriptors?

**CKO_Logo_Horz_Clr.jpg**

What type is it? ←       File extension. (Usually added by computer)

Names can be abbreviated as long as the shortened version is used consistently and can be easily understood. Use dashes - or underscore _ to separate words.

# 3.3 Abbreviations

Commonly-used abbreviations are as follows:

CKO = Check-Out Planning Services Ltd.

CKOP = CheckOutPlan

Corp = Corporation

SM = Social Media

File Naming

Clr = Color

Blk = Black

Horz = Horizontal (usually image orientation)

Vert = Vertical (usually image orientation)

# 3.4 Language

The language we use is bright, direct, warm and friendly. Fun but never disrespectful.

Users = Subscribers of Members

Death = Passing or The End or When the time comes

Corp = Corporation

SM = Social Media

User's Stakeholders = Friends and family

**Bylines**

- How Do *You* Want to Be Remembered?

 - Celebrating a life well-lived

- Define and discover yourself

- Live on through the memories and experiences you share

# 4.0 Governance

a. Check-Out permits its customers, third party developers, partners and the media ("you") to use its name, trademarks, logos, web pages, screenshots and other brand features (the Check-Out "Brand Features", "Marks" or "logos") only in limited circumstances and as specified in these Guidelines. By using Check-Out's Marks, you agree to adhere to these Guidelines and specifically to the Use Requirements and Terms below. If you have a separate agreement with Check-Out that addresses use of the Check-Out brand, that agreement shall govern your use of the Check-Out Marks.

b. The Check-Out marks include the Check-Out name and logo, and any word, phrase, image, or other designation that identifies the source or origin of any of Check-Out's products.

**c. List of trademarks:**
i. Check-Out
ii. The Check-Out logo
iii. CheckOutPlan

## a. "Check-Out" Text Usage Guidelines

i. The company name is "Check-Out Planning Service Ltd."
ii. Do
1. When "Check-Out" or "CheckOutPlan" are used, use only as an adjective followed by a description of our services
2. Examples: Check-Out's planning platform is assisted by, others?
3. If true, you're welcome to say that your product supports Check-Out (we love that!), but please don't use our name or marks as part of yours.
iii. Do Not
1. Don't use "Check-Out" as a noun, verb, plural, or possessive
2. Don't use the Check-Out marks in a way that suggests a common, descriptive, or generic meaning
3. Don't register a domain containing the word "Check-Out" or any variation thereof. Deliberate misspellings and transliterations are also not permitted.

4. Do not apply for a trademark that includes the word "Check-Out," our logo, or any other words or marks similar to our own
5. Do not use "Check-Out" or our other trademarks in connection with advertising (search engine or otherwise) without explicit approval from Check-Out
6. Don't use the Check-Out logo (with or without your company logo)
7. On all marketing materials, include "Copyright © 2019 Check-Out Planning Services Ltd.." marking at bottom, right justified for all marketing materials. [Minimum font size cannot be smaller than 11-12 pts -OR- needs to be clearly legible)

**b. Logo Use Guidelines**

i. Download logos at https://checkoutplan.com/resources/media/ and enter contact info for access.

ii. Brand Manual download at https://checkoutplan.com/wp-content/uploads/2019/11/CheckOutPlan_Brand_Manual.pdf

iii. Do:

1. Ensure there is adequate space between the logo and surrounding elements.

2. For the horizontal logo, the clear space around it should always be greater than or equal to the size of the circular check-mark logomark.

3. For the stacked logo, the clear space around it should always be greater than or equal to the length of one lozenge in the circular check-mark logomark.

iv. Do not:

1. Please don't modify the marks or use them in a confusing way, including suggesting sponsorship or endorsement by Check-Out, or in a way that confuses Check-Out with another brand (including your own).

2. Don't use any logos or similar imagery to represent Check-Out other than the examples we have provided in the Check-Out Brand Manual.

3. Don't use a Check-Out Asset as a substitute for your own

— if you don't have a logo, please do not co-opt ours

4. Don't overprint or obstruct any part of the logo

5. Don't add special effects to the logo, including animation

6. Don't use old versions or any other marks or logos to represent our brand

7. Don't distribute or otherwise make available our logos, marks, or assets

8. Don't crop the logo

9. Don't outline logotype

10. Don't rotate any part of the logo

11. Don't distort the logo
12. Don't use drop shadows or any other effects
13. Don't re-create using any other typeface
14. Don't change the transparency of the logo
15. Don't shuffle around the colors of the logo
16. Don't use different colors
17. Don't change the size or orientation of the circular check-mark logomark and logotype in relation to each other
18. No disparaging or objectionable use is permitted

**c. Screenshots**
i. Screenshots of the Check-Out software and website are permitted for instructive, educational, or illustrative purposes
ii. Don't alter screenshots, except to resize
iii. Don't include screenshots in your product user interface

iv. Don't use screenshots that contain third-party content without the permission of the third party
v. Don't use screenshots that contain an image of an identifiable individual or other personally identifiable information (unless clearly from a fictional character created for testing or display purposes.)

# Thank You!

For more information contact: Media@CheckOutPlan.com