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Who We Are

About Us

Helping you do your best work.

Clearbridge Business Solutions is an operationally focused team of **business and technology experts**. We help businesses (and their people) focus on what they do best by delivering on their IT strategy, security, and support needs.

Our team strives to provide high-quality business-centric results through our under-promise and over-deliver model. We serve organizations local to our community and remote across Canada and the US.

We are highly agile, available, and always here to ask the question - how can we help?



We Solve Business Problems... Using Technology

We love **technology** and the **optimization** it can bring to a business. We leverage IT only in the best places, in the right ways, where it can create more value than the required investment.

As a team of business and technology enthusiasts, we show up each day to work on what we love. We strive to make this evident through our communication and results. We look for the #bestwayspossible, so our customers can do the best work they've ever done.



Unique Selling Proposition

We know businesses have options when it comes to IT services and support. So, what makes Clearbridge the best choice?

We offer a **comprehensive, productivity-focused experience** where we enable our customers to **focus on the job** they were hired for, **rather than IT**. No waiting on hold, no blaming others and getting the runaround. We want to help and are always looking for ways to do things #better.



Outstanding people have one thing in common—an absolute sense of mission.



Our **mission** is important because it communicates our purpose to others and leads the direction of our goals and objectives.

Mission Housekeeping...

- Is our **What**, **Who**, and **Why**—not our How.
- Is the **guideline** by which we operate every day.
- Is **communicated** before day one, and every day thereafter.
- Embraces the **culture** of who we are today.

Our Mission

To **help** people to do the **best work** they've ever done using **technology**—supported by a complete emphasis on **human connection** and **customer service**.



• Believe in a vision and do everything to turn it into a reality. •



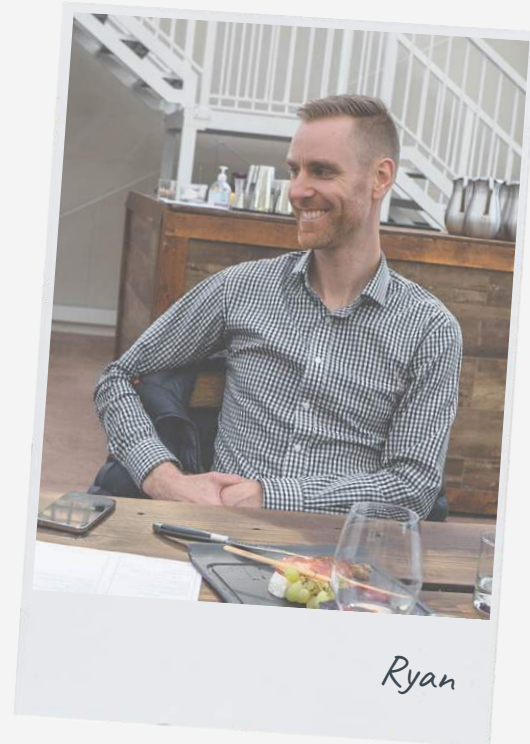
Our **vision** is important because it can inspire and motivate others around us. It acts as a benchmark, providing a line of sight for where our company is going.

Vision Housekeeping...

- Is where we are **going** (not where we are today).
- Guides our **direction** (it does not dictate our decisions).
- Will **evolve**, **change**, and **pivot** (based on what's best for the business).
- Will never be **attained**—the closer we get to it, the faster our vision will evolve.

Our Vision

To be the most **loved**, most **effective**, and most **profitable** technology services company on the **planet**.



Things We Want to Be Known For



Accountability



Generosity



Ambition



Humility



Collaboration



Innovation



Communication



Respect



Curiosity



Transparency



Feedback



Trust



Chona

Our Products

We deliver exceptional **IT strategy**, **security**, and **support** so businesses can thrive.



IT Assurance is a technology partnership that provides businesses with a single point of contact for all computer, server, network, hardware, and software support needs.



ClearOne gives businesses access to a full IT department to support their organization, so teams can focus on their jobs, knowing they have support the whole way.





Our Brand

Brand Purpose

The purpose of this section is to ensure our brand is **communicated correctly internally** and **presented consistently externally** to our audience (existing customers, prospective customers, potential new hires and anyone interested in IT/tech).

If we follow these guidelines, we can **promote our uniquely recognizable brand identity**, which will help us stand out from competitors and remain memorable in the mind of our customers.

Brand Voice

Our brand voice is **relatable**, **approachable**, and **confident**.

In our ever-changing technology landscape, there's always something new and exciting happening. We want to **humanize** our customers' digital experience while coming across as experts in our field.

As a rule, we portray complex information **simply** and try not to complicate the complex.



Brand Voice Example



Hello Joseph!

Thanks for reaching out! I am sorry to hear that your keyboard is freezing every 30-60 seconds. (Briefly reiterating the issue shows we understand what the problem is.)

Is your keyboard wireless or wired and how long have you been experiencing this issue? (Asking clarifying questions to gather information is important!)

I would be happy to help resolve this issue as soon as possible! I will need your assistance while I troubleshoot. Can I please connect to your workstation? (Depending on urgency and impact vs. priority, offer to connect to their workstation. Let them know if they need to be involved in troubleshooting or if they can be away from their computer!)

Great news! I fixed the issue. Your keyboard should be working now. If you have any questions or additional concerns, feel free to let me know! (Invite them to ask questions, provide more information, or call if they want to talk! Include our phone number to make it easier for them to call.)

Thank you so much for working with Clearbridge. Have yourself a great rest of your day! (Finish off with a polite thank you or have a great day. The sign-off is a great time to use our relationship with the client to form a more personal sign-off.)

[Standard Clearbridge email signature]

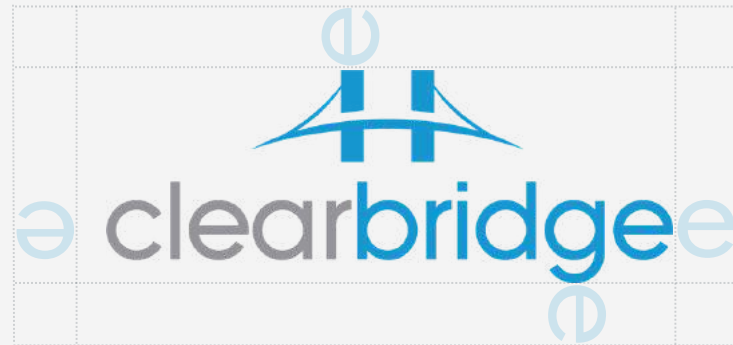
Our Logo

Think: **clean**, **crisp**, and **modern**.

We chose the colour **blue** for its sense of calm and feelings of trust. It was also inspired by the sky on a clear day or the clarity of water.

The name **Clearbridge** connotes two important messages - 'Clear' means easy and visible, while 'bridge' is our way of 'bridging the gap' between business and technology.

We are a **connecting point** between business and technology excellence. We help support the growth that is already there, so businesses can focus on doing their best work.



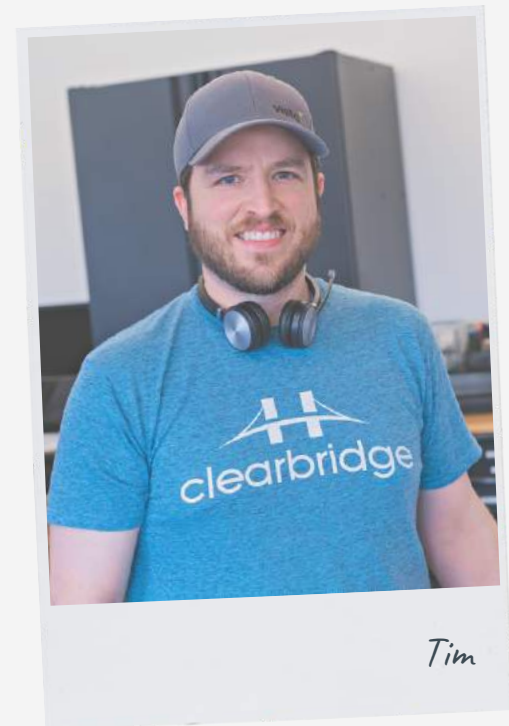
Use the letter 'e' for the appropriate minimum spacing around each logo variation

Logo Dos and Donts




The Clearbridge logo must always be visible over the background behind it.

Make sure there is enough contrast between the logo and background. Do not alter the logo in any way. Use our Standard logo (blue + gray) for brighter backgrounds. Then, use our Misty Mountain/Charcoal logo for darker/white backgrounds (the same logic applies to laying our logo over photography).

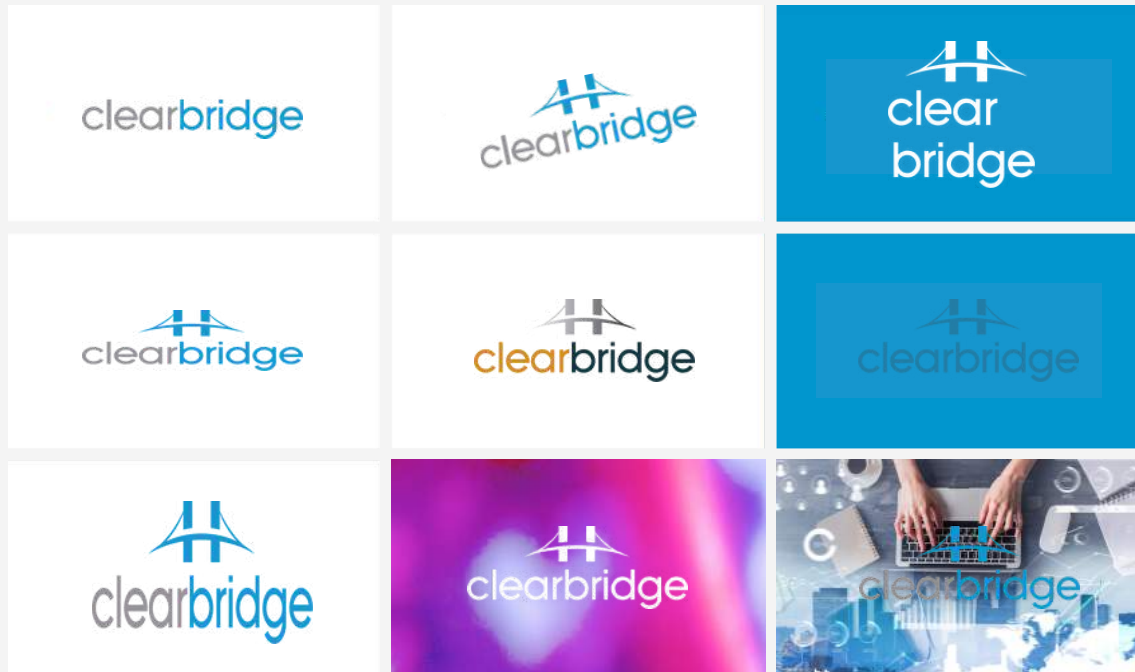
Don't use the wordmark alone; however, the bridge can be used independently. Don't stretch or squeeze it. Don't rotate it. Don't use busy or conflicting backgrounds. Don't create your own version. Don't use it against low-contrast backgrounds. That's a lot of don'ts, but trust us, it makes a huge difference.



Dos

Don'ts



Colour Palette & Uses

Clearbridge has a palette of **five colours** which are applied throughout all our branding and communications.

Charcoal, Spanish Gray and Misty Mountain are primarily used for text and background.

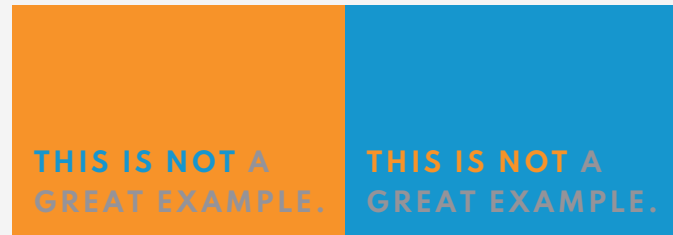
Clearblue and Deep Saffron are used as accent colours for extra impact. We recommend using these colours for accents and text only.

Any desire to use colours outside of this palette would need to be reviewed and approved by the marketing team.

Great



Not So Great





CLEARBLUE

RGB
#1696CE
R: 22
G: 150
B: 206

CMYK
C: 89
M: 27
Y: 0
K: 19



SPANISH GRAY

RGB
#959399
R: 149
G: 147
B: 153

CMYK
C: 3
M: 4
Y: 0
K: 40



CHARCOAL

RGB
#3C4952
R: 60
G: 73
B: 82

CMYK
C: 27
M: 11
Y: 0
K: 68



DEEP SAFFRON

RGB
#F79329
R: 247
G: 147
B: 41

CMYK
C: 0
M: 40
Y: 83
K: 3



MISTY MOUNTAIN

RGB
#F4F4F4
R: 244
G: 244
B: 244

CMYK
C: 0
M: 0
Y: 0
K: 4

Typeface & Uses

Spartan is an open-source typeface based on early 20th-century American geometric sans serifs.

We have chosen Spartan as our primary typeface due to its clean, contemporary, and playful design.

With a wide variety of styles and weights, Spartan is versatile and can be used for every type of use Clearbridge will need.

Spartan should be used for all branding and communications, including content (videos + social media), campaign briefs and project outlines.

Spartan Light
abcdefghijklmnopqrstuvwxy
ABCDEFGHIJKLMNOPQRSTUVWXYZ
0123456789!@#\$%^&*()-=+/<>?"';

Spartan Regular
abcdefghijklmnopqrstuvwxy
ABCDEFGHIJKLMNOPQRSTUVWXYZ
0123456789!@#\$%^&*()-=+/<>?"';

Spartan SemiBold
abcdefghijklmnopqrstuvwxy
ABCDEFGHIJKLMNOPQRSTUVWXYZ
0123456789!@#\$%^&*()-=+/<>?"';

Spartan Bold
abcdefghijklmnopqrstuvwxy
ABCDEFGHIJKLMNOPQRSTUVWXYZ
0123456789!@#\$%^&*()-=+/<>?"';

When using **Spartan**, we recommend you stick with the weights shown for the corresponding purpose.

Use Bold for titles and headlines, SemiBold for subheadlines, and Regular, Medium, or Light as our body weights.

As mentioned on the previous page, using any weight and size is an option, as long as it is reviewed and approved by the marketing team.

Additionally, tracking (the spacing between each letter) can be set between -10 - 400. Again, any changes will need to be reviewed and approved by the marketing team.

Bold is our headline weight.

SemiBold and Medium are our subheadline weights.

Medium and Regular are our body weights.

Regular and Light are our body weights.

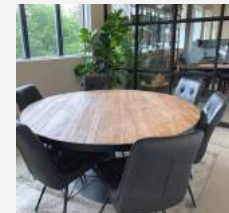
Great Photos

Photography

To achieve the right **visual style** for Clearbridge, consider the content, composition, tone & palette, and always think about highlighting people and telling our story.

While shooting, try to avoid depressing or dull tones, but instead, aim for bright and joyful. For example, take advantage of a sunny day using the glowing natural light vs shooting on a dark, rainy day.

While editing footage or photos, confirm the content is in focus, with correct colouring, and proper staging.





Communication

Communication Purpose

The [purpose](#) of this section is to [show you how Clearbridge communicates](#). This should be reflected in every aspect of our communication from emails, customer support and sales calls to video content and social media posts.

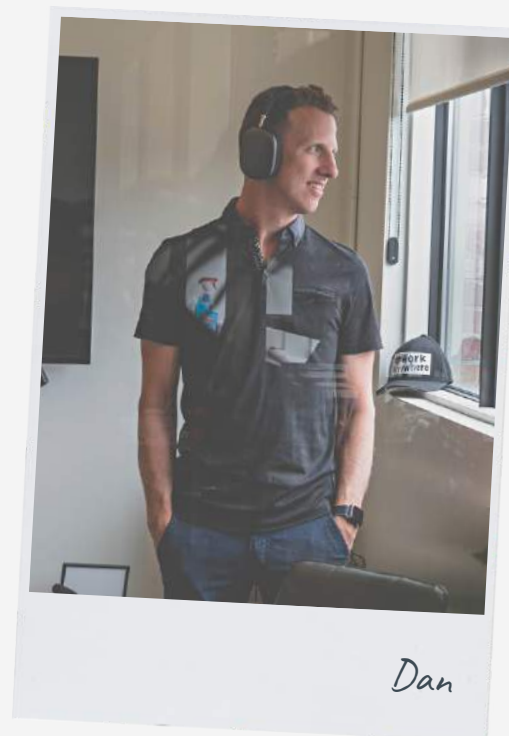
If we adhere to these guidelines, we can ensure our core message remains the same - [helping you do your best work](#).

Email Guidelines

When drafting emails, use your **best judgment** to determine the **appropriate language**.

Some tips -

- Limit **reply all** to those who need to be copied.
- Before **forwarding emails**, determine whether sensitive information is being inadvertently shared.
- Respond to support emails within **15 minutes** (ideally); respond to personal business emails within **60 minutes**.
- Start the email with a **professional** and **friendly greeting**.
- Always use **correct spelling** and **grammar**.
- Begin **new paragraphs** as needed.
- **Emojis** can be misunderstood; **use sparingly**.
- Your last paragraph should contain either a **question**, **call-to-action**, or **proposed plan**.
- Use our company-approved **email signature**.
- If in doubt, or it's an **important message**, be sure to get a second set of eyes on the email.



Annotations:

- Limit reply all
- New paragraph
- Use emojis sparingly
- Professional/friendly sign-off
- Clear subject line
- Professional/friendly greeting
- Correct spelling and grammar
- Add a question, call-to-action, or proposed plan
- Professional photo
- Use company approved email signature
- Use company approved banner

Email Content:

Amanda Loungsay

Confirm Lunch & Learn Date/Time

Good morning, Amanda,

Thank you for this opportunity!

Could you kindly confirm the day/time I will be presenting?

If there are still slots open, June 15th at 12 PM works.

😊

Best regards,

Chona

Chona Canlas
Marketing Coordinator at Clearbridge Business Solutions

778-383-6726 Ext. 761
chona.canlas@clearbridge.ca
clearbridge.ca

in | | f

1 Prepare

Be mentally prepared, ready to capture notes if needed. Take a deep breath and smile before answering.

2 Answer

Answer the phone promptly, then offer a friendly, yet professional greeting. Be sure to speak with a smile, be clear, and avoid using any slang. This is an opportunity to start the conversation on a positive note, so use an upbeat tone to help the caller feel welcomed and at ease.

3 Rapport

Be enthusiastic, friendly, and genuine. Make them feel comfortable! You do not have to be extremely formal but err on the side of professionalism. Ask open-ended questions. If a customer is not interested in chatting, simply let them know "I captured all of the information should it be required in the future!"

4 Lead

Maintain control of the conversation and gather as much information about the problem (if there is one) as effectively as possible.

5 Capture

Capture notes and repeat back what they are saying to confirm the information. If unsure, ask for clarity and always practice active listening.

6 Ask

The more questions, the better. We're excellent question-askers! Be curious and take detailed notes. Summarize the information, verbally confirming the information received from the customer to avoid any misunderstandings or the need to follow up too soon to ask again.

7 Timeline

Give the customer a timeframe. If there's a need to get back to them, let them know. The minimum standard is to set a realistic timeline for follow-up and then stick to it.



Social Media Style Guide

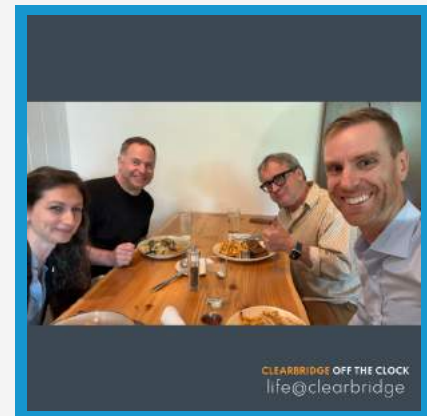
- Be **consistent** across all channels to establish credibility, trust, and strengthen our reputation.
- Actively **engage** with our audience by liking and commenting on posts 15 minutes a day.
- Apply our **brand voice** for captions (relatable, approachable, confident).
- Use **images** that reflect our photography guidelines.
- Use **templates** for any graphic application or get approval from the marketing team.
- **Write short, but smart**: Twitter (280 characters); Facebook (aim for 1-2 short sentences); Instagram (try to keep it to one sentence or a short phrase). However, **long-form captions** are a terrific opportunity for storytelling and typically result in higher engagement.



Apply Brand Voice



Use Templates



Use Images

Social Media Style Guide Continued...

- Use our [branded hashtags](#) and [adjectives](#) whenever possible.
- For [Instagram](#), add hashtags in the comments section.
- Avoid using [acronyms](#) or [technical jargon/terms](#) that can confuse our audience.
- Responses to [comments](#) should be upbeat, optimistic, and positive.
- Have a [pulse](#) on [conversations](#) that will help expand our core audience.
- Finish [captions](#) with action words that entice our audience to make a specific move.



Use Hashtags

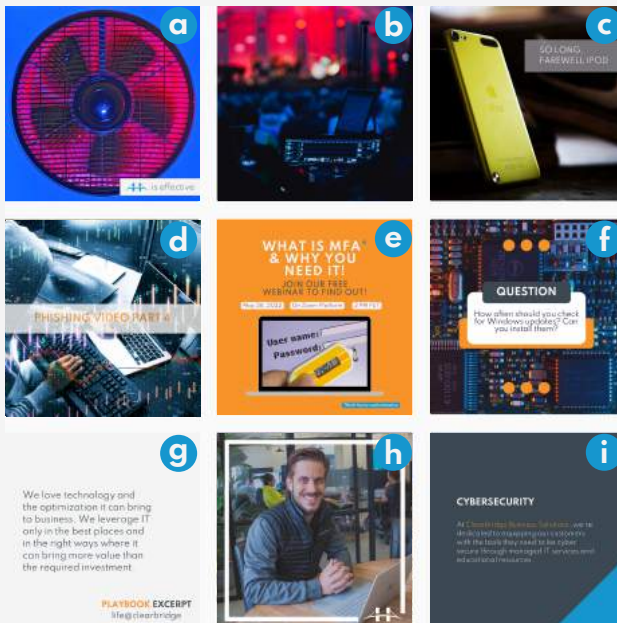


Avoid Jargon



Have a Pulse

Great Grid Example



A great social media post uses images, graphics, and videos to **tell a captivating story**. Visual content is engaging, and brand elements are properly applied. Use this opportunity to **feature our work and people!**

- a** Pick stock photos that can be written with **great captions**.
- b** Play with **bold and colourful graphics**.
- c** Post about relevant and interesting **technology news**.
- d** Post branded **video content** on a regular basis.
- e** Post about our **upcoming webinar**; use branded orange.
- f** Post a **carousel** about a They Ask You Answer question.
- g** Post **branded content**, such as a "Playbook Excerpt".
- h** Use **in-house photos** that highlight our team.
- i** Post textual content that helps to **educate and inform**.

Poor Grid Example



If 3 mistakes or errors in a design can be identified, whether that be a social media post, a grid, or a caption, approach it differently - #makechange happen!

- a** Images of people - Using images that don't belong to us is against the law and will require proper permission—whether through a license or the creator directly.
- b** Cropping - Be cognizant of how images will appear on the feed. If it ends up being cropped, it will look unprofessional.
- c** Colours and fonts - Brand guidelines are in place to ensure our brand is properly represented and reflects who we are and what we do.

Our Hashtags

Hashtags help make content **discoverable** and serve as an **indication** (for users and algorithms) that a piece of content relates to a **specific topic** or belongs to a **category**.

CATEGORY hashtags - Use these in social media posts/comments for the sake of the algorithm.

Service-related (#techexpert #techcompany #cybersecurityexpert #cybersecurity #cybersecuritytraining #itprovider #cybersecuritytips #itservices #businessimprovement #businessdevelopment)

Location-related (#localbc #abbotsfordbc #fraservalley #abbotsfordbusiness #abbotsford #downtownabbotsford #thefraservalley #vancouverbc #britishcolumbia #localbusiness #britishcolumbia #fraservalleyliving #bcbusiness #beautifulbc #chilliwack #langley #smallbusinessbc #vancity #localcommunity)

BRANDED hashtags - Use these WITHIN our copy, in Teams messages between each other, newsletters, social media posts etc.

#bestwayspossible #better #workbetter #clearbridgebusinesssolutions #clearbridger #teamclearbridge #clearbridge #cbfit #lifeatclearbridge #lifewithclearbridge #meetaclearbridger #bestwork #zoomingin #offtheclock #intheoffice #playbookexcerpt

Hashtag Best Practices

- ✓ The number of hashtags that can be used depends on which platform is being used.

Example: Twitter 1-2 Facebook 1-2 Instagram 5-10 YouTube 2-3 LinkedIn 1-3

- ✓ Keep hashtags short and memorable rather than trying to use a lot of words in one tag.

Example: #bestwayspossible works better than #doingthinginthebestwayspossible

- ✓ Don't try to choose hashtags that are too clever or obscure.

Example: #ClearbridgerManual may not be clear to users, use #Playbook instead.

- ✓ Use detailed and specific hashtags as this will lead to better results than broad or general ones.

Example: #cybersecurity is specific, whereas #cyber is more general.

Newsletter Guidelines

Newsletters **create** and **increase awareness** and provide **valuable data**.

The **#BETTER NEWSLETTER** is our way of helping our customers do their best work.

Sent on the first Thursday of every month, the #better Newsletter focuses on:

- ✓ Our current webinar
- ✓ Our latest video
- ✓ Our latest blog post
- ✓ Our latest Tech Tips

We also have a feature called **What's Happening at Clearbridge** where we mention the latest news and updates, and finally, a feature called **Meet a Clearbridger** where we introduce one of our team members.

To your best work,



Branded Signature

Banner Example



Graphic Example



Newsletter Guidelines

In a second and third newsletter called the **FRIENDLY REMINDER NEWSLETTER & LAST CHANCE NEWSLETTER**, we promote our training content (webinars, podcasts, non-live videos etc.) one week and one day before it goes live. This gives our audience two extra chances to participate. Our goal? To provide you with top-notch education on all things technology-related!

Extra tips -

- ✓ Use our branded font (Spartan).
- ✓ Banners should be in Charcoal.
- ✓ Use Deep Saffron as a highlight.
- ✓ Keep content short & sweet.
- ✓ Link to any needed/relevant content.
- ✓ Stay in line with our brand voice.
- ✓ Use buttons whenever possible.
- ✓ Use UTM links (for tracking web traffic).
- ✓ Sign off with our branded signature.

Banner Example



Graphic Example



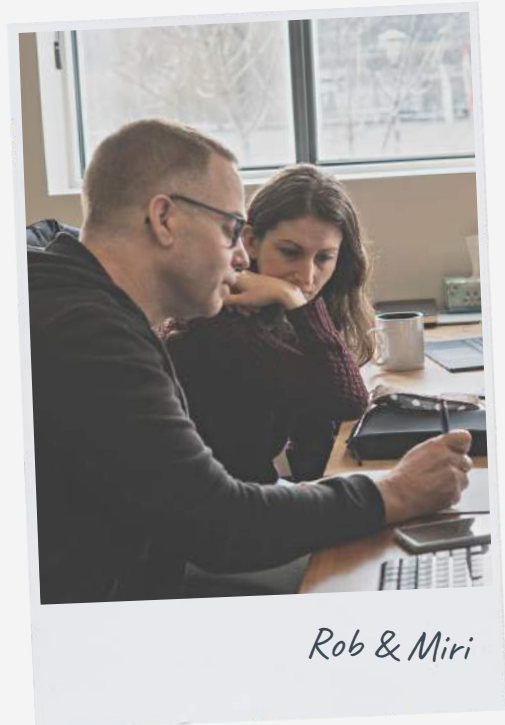
Collaboration

When we **collaborate**, we connect dots, look for answers, and explore different paths we embark on together. **The goal?** Find a solution that will make a difference!

Top 5 reasons WHY it's important -

1. It helps us problem-solve/leads to innovation.
2. It enables us to learn and grow.
3. It opens new communication channels.
4. It helps boost morale and motivation.
5. It makes us more efficient workers.

When we work together, whether with each other or customers, we build **trust**, **commitment**, and **self-awareness**.



Team Feedback

We give and receive feedback. It's about **speaking up**, **listening actively**, and **sharing ideas** to find the **best possible solution** to benefit the team.

Some great feedback **questions** -

1. How do you feel that went?
2. What do you think we could have done differently?
3. Are you happy with our performance?

A great feedback **example** -

"I'm happy with your determination to finish this project. It's something to be proud of! However, the results aren't exactly what we're looking for. This requires us to reevaluate our approach and will take up time and resources. To ensure we don't make this same mistake again, how can I help support your best work on your next project?"



Customer Feedback

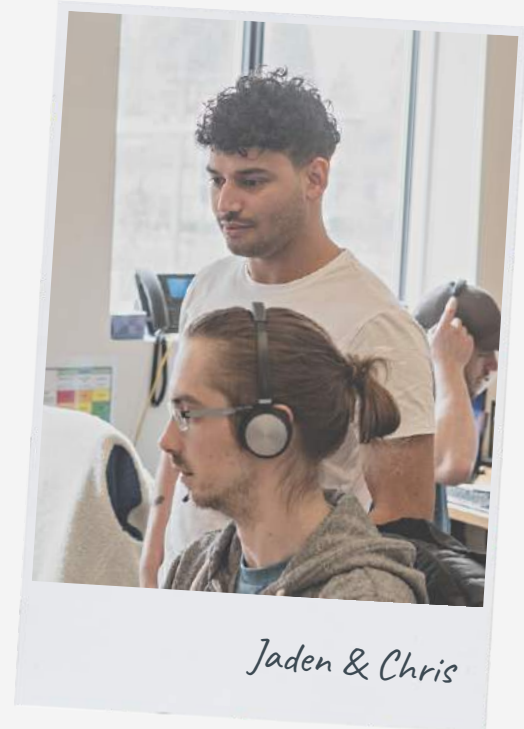
We take a **proactive approach** when collecting customer, vendor, and staff feedback. That way, we never stray too far from the **needs of our community**, even as those needs evolve.

Why is customer feedback important?

1. Guides improvements for our customers' experience.
2. Empowers positive change in our business.
3. Allows us to adapt to our customers' needs.

Ways that we collect customer feedback -

- ✓ Setting up regular phone calls.
- ✓ Providing in-person site visits.
- ✓ Monitoring social media activity.
- ✓ Sending surveys to improve our processes (training).
- ✓ Measuring on-site activity (analytics).
- ✓ Engaging through our webinars and newsletters.
- ✓ Displaying positive customer feedback.



Setting SMART Objectives

Setting **SMART goals** helps us become **clearer** and **more concise** about our objectives. They also give us a **sense of direction** when attaining results.

S Describe an observable action, behaviour or result.

M Determine a baseline measurement to quantify progress.

A Work toward a goal that is challenging, but possible.

R Align a pertinent target to business goals.

T Set a timeframe or clear deadline for achieving goals.





Our Space

Space Purpose

The purpose of this section is to help you find **effective ways** to keep your **space and environment clean and organized**. By following these guidelines, Clearbridgers can **save time**, and **improve productivity**.

In addition, maintaining a 'Clearbridge Space' will help give you a sense of purpose as you take care of the **right things** in the **best ways possible**.

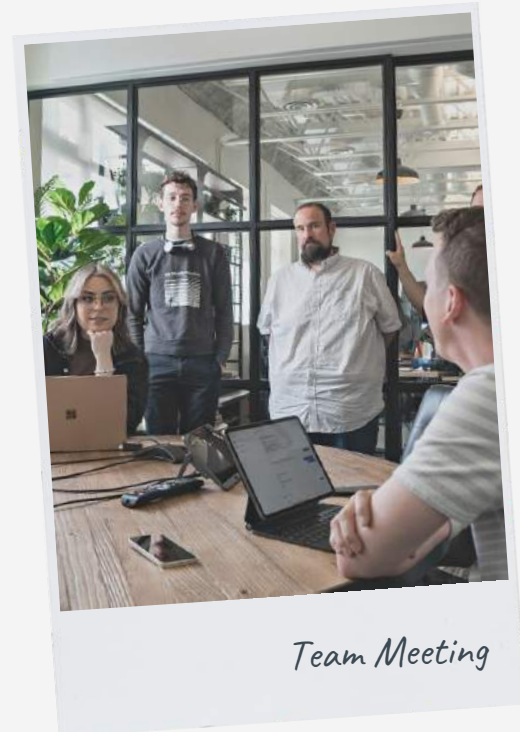
What's a 'Clearbridge Space'?

These **3 words** best describe our space -

Collaborative - Through **purposeful interaction**, we can learn from each other, boost team morale, and solve problems more effectively.

Energetic - Positive and **purposeful engagement** can lift the mood of the entire team, pushing us to work harder and be better overall.

Team-based - Working on a team driven by **purposeful motivation** encourages growth, and can improve job satisfaction and reduce stress.



Team Meeting

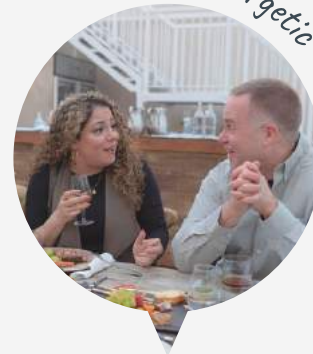
Collaborative



Team-Based



Energetic



Maria



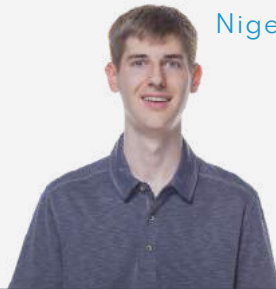
Rikki



Jaden



Nigel



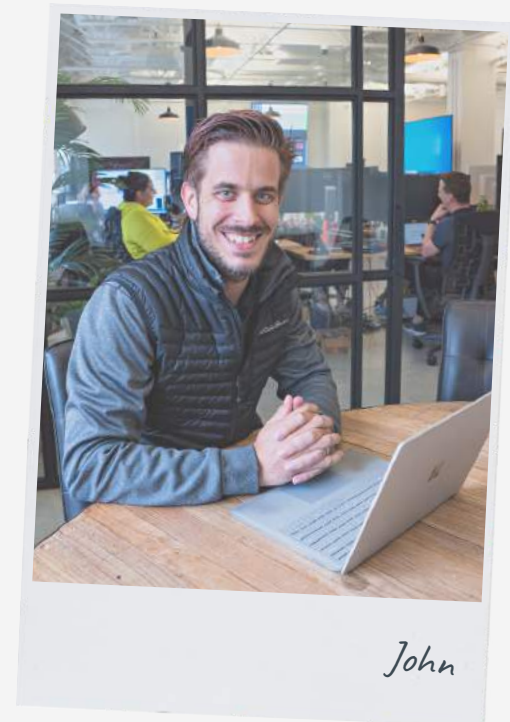
Jordon



Our Office Set-Up

Implemented correctly, **effective ergonomics** can improve **productivity** from **10 to 15%**. Practice these **simple tips** to help you get through your workday!

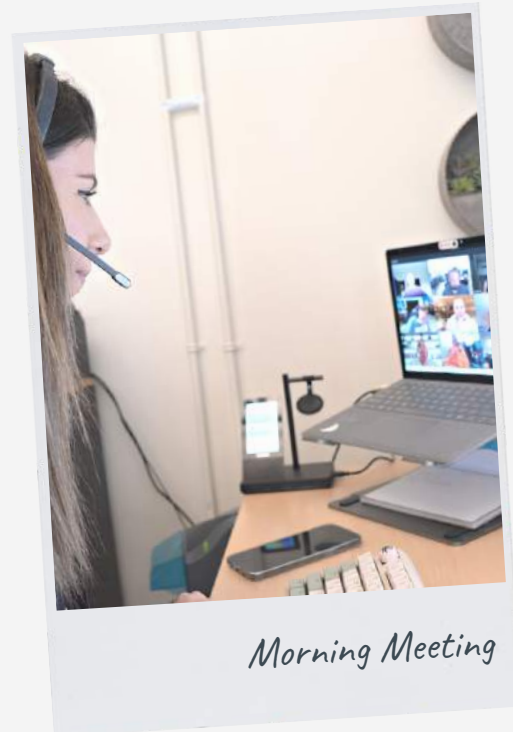
1. Find a comfortable position to work in.
2. Alternate tasks to prevent the same movements that can cause strain.
3. Incorporate regular rest breaks (stand up at least 30 minutes per hour).
4. The Embody chair can be adjusted for a variety of seated postures.
5. Pre-set the desk sitting & standing heights.
6. Make sure the monitor is at eye level and the brightness no higher than 50%.
7. Chill out! Work pressure, whether physical or not, can contribute toward health issues.



Setting Up Our Desktop for Video Meetings

Video meetings can go off without a hitch with a little **preparation** and **common sense**!

- ✓ Make sure the lighting is in the front.
- ✓ Use a mic that's closer to the face.
- ✓ Keep the camera at eye level.
- ✓ Declutter the environment.
- ✓ Use an uncomplicated background.
- ✓ Be prepared - practicing always helps.
- ✓ Use a hardline internet connection if possible.



Morning Meeting

Keeping Our Desk Space Clean

Our desks reflect **us** and **our business**. Having a disorganized desk can hinder **focus** and our ability to **process information**. Follow these steps -

- ✓ Be thoughtful about notebooks, sticky notes, and sheets of paper on your desk.
- ✓ Clear the floor and desk of anything not being used or garbage in general.
- ✓ Physically separate home and work life to minimize distractions.
- ✓ Pay attention to digital clutter (email windows, apps, and files can pile up).
- ✓ Manage cable clutter (use a cable tray to keep stray cables uncluttered).
- ✓ Update the filing system - create folders for projects and archive folders.
- ✓ Participate in weekly desk clean-ups (every Friday at 3:30 PM).

A Clearbridge Workstation

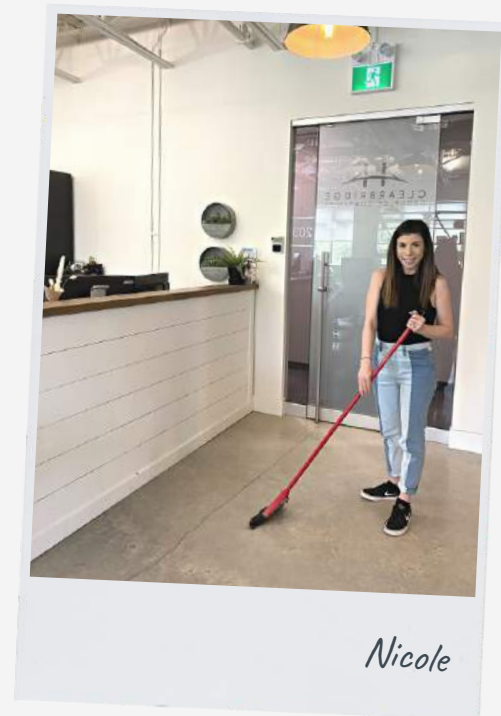


- a** Disinfect surfaces.
- b** Keep cords organized.
- c** Be tidy when eating.
- d** Minimize knickknacks.
- e** Digitize lists and notes.
- f** Dust the computer screens.
- g** Add plants for decor.
- h** Keep a bullet journal on hand.
- i** Set time to tidy each day.

Keeping Our Office Clean

A **clean** and **tidy** workplace can help -

- ✓ Give a good impression to customers visiting us.
- ✓ Increase team productivity.
- ✓ Contribute to higher mood and morale.
- ✓ Reduce the chance of employees getting sick.
- ✓ Remove workplace hazards.
- ✓ Keep the entire office organized.
- ✓ Inspire confidence and better collaboration.



WFH Tips 10 Ways to Do Remote Working Better



- 1 Make sure the internet connection is safe
- 2 Have a cup of tea or coffee
- 3 Answer urgent emails/messages first
- 4 List daily tasks
- 5 Outline priorities
- 6 Create a routine
- 7 Make time for breaks
- 8 Keep the space clean and organized
- 9 Maintain regular hours
- 10 Socialize with the team

Thank You!

Thank you for reading our Playbook! For us, this is a learning tool, a check-and-balance, and a roadmap for the future. My hope is that we all use it to influence our decisions and work towards #better each day.

- Ryan



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