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Brandon.

Handoff Deliverables

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Market Research Report

Key Findings

1. Perceptions of Risk & Timing

- Participants don't feel they are at risk of having their brands copied, given that they are well known and supported in the Athens community
- Concerns about trademark protection exist but are seen as a "background worry"
- Expansion into larger markets is a trigger for participants to seriously consider trademarking

2. Trust & Legitimacy

- Participants require reliability and affirmation that a tool has "legit" legal backing
- Emphasizing that attorneys support or validate an online tool would make participants more likely to use it
- Other online tools are described as less credible than direct attorney support

Pain Points: Cost, Time, Jargon

Participants explain the "perfect" process as easy to understand, affordable, and guaranteed to hold up in court. They want an easy way to understand the process and clear help through the steps.

Market Segmentation

1. Demographics

Age: 25-45 years old

Education: Bachelor's degree or higher

Occupation: Small business owners

Business Size: Varied from 2-10 to 51+ employees

2. Psychographics

- Participants require reliability and affirmation that a tool has “legit” legal backing
- Emphasizing that attorneys support or validate an online tool would make participants more likely to use it
- Other online tools are described as less credible than direct attorney support
- Seek simple, trustworthy, and affordable solutions.

Opportunity Analysis

Participants explain the “perfect” process as easy to understand, affordable, and guaranteed to hold up in court. They want an easy way to understand the process and clear help through the steps. An emphasis is also placed on reliability and if they were to use an online tool, they would want to know that an attorney has affirmed the information.

User Persona: Curious Small Business Owner

Brandon.

Tell me about yourself and your business.

Andrew Lee

I'm Andrew, I'm 32, and I run a local coffee shop that's been steadily growing in popularity. I don't know much about the trademark process, but I'm curious if it's something I need for my business. I've played around with AI tools like ChatGPT for marketing ideas, and I'm open to using AI to learn more about protecting my brand.

Sounds great! So, what are you hoping to get out of this?

- I want to understand what trademarks are and whether I really need one
- I'd like to check if my shop's name is unique and worth protecting
- I'd love simple, step-by-step guidance without all the confusing jargon
- I'm open to using AI as a low-pressure way to learn

Got it! What's been tricky or stressful about this for you so far?

- I don't really know how the trademark process works
- I'm worried it could take too much time, money, or effort
- I'm hesitant to hire a lawyer unless I know it's absolutely necessary
- I like the idea of AI helping, but I'm still a little cautious about accuracy

User Persona: Hesitant Business Owner

Brandon.

Tell me about yourself and your business.

Linda Hayes

I'm Linda, I'm in my late 50s, and I've been running my boutique for over ten years. I've wanted to get a trademark for a while now, and it's finally time to make it official. I really don't want to pay thousands of dollars for a lawyer, but I'm a bit skeptical about using AI for something this important. Still, I figured it's worth seeing if it can actually make this process easier.

I hear you. What would make this easier for you?

- Being able to file my trademark without paying lawyer fees
- A clear, step-by-step process I can follow on my own
- Guidance I can actually trust without confusing legal jargon
- Confidence that my brand will be protected the right way

Understood. What's been the hardest part of getting this done so far?

- Not knowing which resources I can really rely on
- Feeling like it's either DIY confusion or expensive legal help
- Worrying I'll make a mistake if I try to handle it alone
- The cost just feels too high to justify hiring a lawyer

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Future Recommendations

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1. Blog Post Recommendations

- **Current Events** that highlight the real world impact of trademark protection
- **Helpful Guides** about the trademark process that are written by Stacy and answer common questions
- **Educational Articles** that emphasize the importance of trademarks, to help small businesses recognize the need

- “Trademark Attorney vs. DIY Filing: An Honest Comparison”
- “5 Ways Brandon Helps You Avoid Common Trademark Application Mistakes”
- “Why a Trademark Attorney Built an AI-Powered Trademark Assistant”
- “The Real Cost of Not Having a Trademark”
- “Do I Really Need a Trademark If I’m Just Selling Locally?”
- “Stacy’s Trademark Timeline: What to Expect Throughout the Process”
- “Should I Trademark My Name or My Logo?”
- “Every Step of the Trademark Process Explained”

Future Recommendations

2. Large-Scale Research

What We Did: Conducted two rounds of survey research to gather insights about small businesses' perceptions of the trademark process. The first round targeted local Athens businesses, while the second round reached trademark-registered small businesses across the United States. While we gathered valuable preliminary data, response rates were lower than anticipated, indicating opportunities to refine the approach for future research phases.

Recommendations for Next Steps:

- **Optimize survey design** by reducing completion time to 5-7 minutes maximum and prioritizing the most critical questions at the beginning to capture key data even from partial responses
- **Emphasize research purpose clearly** by framing communications to explicitly state this is market research with no sales intent
- **Provide incentives** to motivate busy business owners to complete surveys
- **Explore complementary methods**, such as phone calls, focus groups, or secondary data analysis to increase overall data quality

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Voice, Tone, and
Brand Personality Guide

Voice, Tone, and Brand Personality Guide

Role: To support entrepreneurs and small business owners through the trademark process by providing expert-level guidance and personalized advice

Persona: Brandon is a lawyerly and approachable AI sidekick. Brandon is educational and authentic, being a personal guide when it comes to trademark law.

Goals: To give entrepreneurs the confidence and clarity they need to submit a trademark to the USPTO that will be approved.

Tasks: Brandon can perform, Trademark Lookup, Design Code Analysis, and a comprehensive Similarity Search.

Constraints: Brandon should avoid giving legal advice that replaces a licensed attorney. Brandon should also avoid complicated legal jargon.

Rules: Keep a user's information private and maintain a professional, yet friendly tone in all cases.

Skills: Brandon's skills include document analysis, risk assessment, and USPTO filing preparation support.

Values: Accessibility, Compassion, Innovation, Transparency, Credibility

Voice, Tone, and Brand Personality Guide

Plain-language law: Always translates legal jargon into everyday speech (e.g., “An Office Action just means the USPTO has questions for you. It’s like a barista asking you what kind of milk you want.”).

Metaphors/analogies: Lightly used, friendly, not overdone (e.g., “Think of this like choosing a username that isn’t already taken. Except here, the stakes are a little higher.”).

How Brandon Reacts in situations:

- Consistency: “How can I help you?”, “Great Question!”
- Empathy first: “I see how ___ is confusing”, “Let’s work on this together”
- Proactivity: “Let’s take this one step at a time”
- Transparency: “The USPTO says ___ about ___”

User is stressed/overwhelmed → “This is a hard task! Let’s break it down step by step”

User is celebrating → “Congratulations, you did it!”

User challenges Brandon → “Great question! Here are links where you can read more about what I am referencing”

Voice, Tone, and Brand Personality Guide

Catchphrases and Signature Lines:

- “Let’s take a close look at this together, no magnifying glass required.”
 - “You’ve got good options here. Your trademark future is brewing up stronger than your morning coffee.”
 - “Better to know now than later, think of it like catching spinach in your teeth before the big meeting. Let’s pivot smartly.”
 - “Let’s avoid wasted time and take the express lane.”
 - “Smart move. You’re basically trademark chess-master level now”
 - “You’re on solid ground–no quicksand here.”
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UI/UX Concepts &
Wireframes

UI/UX Concepts & Wireframes

To Download From View Mode:

1. Click on the Figma logo in the top left-hand corner
2. Go down to “File”
3. Click on “Save Local Copy”
4. The file should download as a .fig file

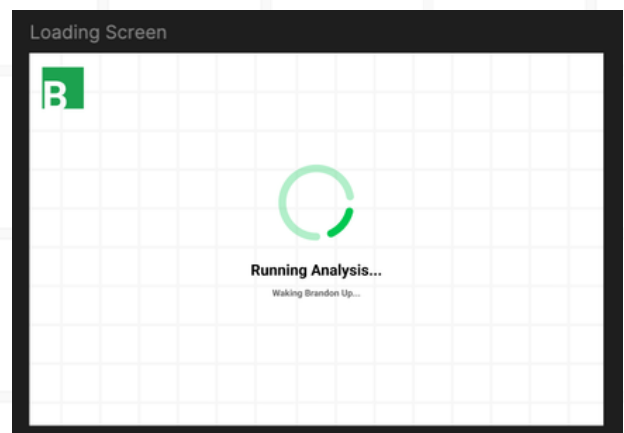
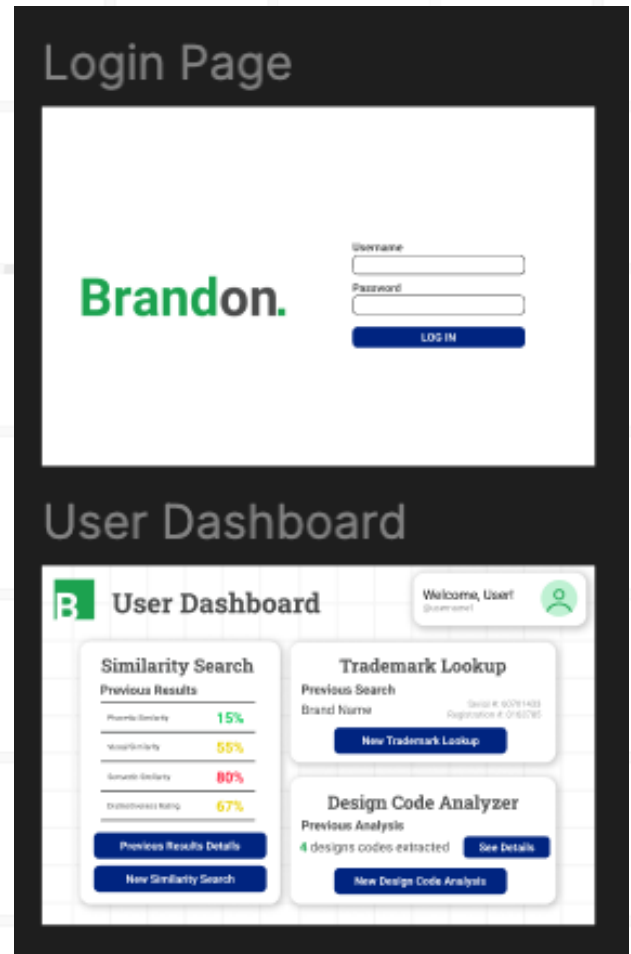
Project View

Prototype

Dev Mode

*All files were emailed to Chaz and can also be accessed via these buttons

UI/UX Concepts & Wireframes



UI/UX Concepts & Wireframes

