

What is a brand? Is it a logo? A name or slogan? A graphic design or color scheme?

**Your brand is the entire experience your prospects and customers have with your company. It's what you stand for, a promise you make, and the personality you convey.** And while it includes your logo, color palette and slogan, those are only creative elements that convey your brand.

In B2B companies, your brand lives in every day-to-day interaction you have with your market:

- **The images** you convey
- **The messages** you deliver on your website, proposals and sales materials
- **The way your employees interact** with customers
- **A customer's opinion** of you versus your competition

In your industry, there may or may not be a strong B2B brand. But when you put two companies up against each other, the one that represents something valuable will have an easier time reaching, engaging, closing and retaining customers. A strong brand strategy can be a big advantage.

Have you ever audited your brand? If you're not sure whether you're communicating it effectively and consistently, this exercise can help you match your goals to what the market sees, hears and experiences.

## Summary

EXERCISE SUMMARY	
<b>When to Address</b>	<p>If you're a company with a product/service in the already in the marketplace, you've completed your competitive positioning and are ready to define your brand strategy</p> <p>If you're missing your revenue targets and are unsure why</p> <p>If you're planning on revising some of your brand creative elements</p> <p><i>Note</i> – If you haven't yet launched your product, move to Exercise 21 – Choose Your Brand Type</p>
<b>Who Should Participate</b>	<p>Business leaders: company founders, owners, presidents and vice presidents</p> <p>Marketing and sales leaders</p>

	Marketing coordinators and sales reps
<b>Where to Use the Results</b>	Review your results and use the rest of the Brand Strategy exercises to update or improve your brand strategy.
<b>Why it's Important</b>	Your brand should bring your competitive positioning to life and capture the mindshare of your slice of the market. It's challenging to do well, but immensely valuable when done so. Strong brands create tremendous economic goodwill on company balance sheets.
<b>What Builds Upon it</b>	All of your interactions with the marketplace
<b>Timeframe to Completion</b>	A few days to a few weeks, depending on your situation
<b>Potential Business Impact</b>	High
<b>Deliverable</b>	You'll determine the view of your brand from inside and outside your company and map out a plan to correct any inefficiency.
<b>Next Steps</b>	If your brand strategy needs improvement, continue with the rest of the exercises in Brand Strategy.

<b>Target Completion Date</b>	
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PARTICIPANTS

**PARTICIPANTS**

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**TASKS TO GET STARTED**

**PERSON  
RESPONSIBLE**

**DUE DATE**

TASKS TO GET STARTED	PERSON RESPONSIBLE	DUE DATE

**Notes**

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### What to Complete

- 1. SUMMARIZE YOUR BRAND**
- 2. AUDIT YOUR BRAND INTERNALLY**
- 3. AUDIT YOUR BRAND EXTERNALLY**
- 4. ANALYZE AUDIT RESULTS**

### Where it Fits in Brand Strategy

Summarize Your Brand

Audit Your Brand Internally

Audit Your Brand Externally

Analyze Audit Results



Choose Brand Type

Confirm Your Value Proposition

Select a Brand Theme

Determine Value of Your Features & Benefits

Chart Your Emotional Benefits

Determine What Your Brand Means

Create Your Brand Personality Traits

Create Your Brand Promise

Define Your Brand Strategy

Create Your Brand Positioning Statements

Write Your Brand Story

Select Brand Visual Requirements

Match Visual Requirements to Existing Brand

Define Brand Operational Requirements

Match Operational Requirements to Existing Brand

## 1. SUMMARIZE YOUR BRAND

The first step in your brand audit is to have your leadership team summarize your brand. You'll use this to compare to the results of your internal and external surveys.

If you're not sure how to answer some of the brand strategy questions, you may want to take more time to fully define your brand strategy *before* conducting your brand audit. That's fine, and if you'd like to do so, jump to Exercise 21 – Choose Your Brand Type. After you've completed the rest of the Brand Strategy exercises, return to this step and enter your results.

BRAND SUMMARY PARTICIPANTS	

**What is our value proposition?**

<b>PRIMARY VALUE PROPOSITION</b>	
<b>SECONDARY VALUE PROPOSITION</b>	

**What are the most powerful emotional benefits we deliver to our customers?**

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**What are the three things our brand should mean to our customers?**

<b>1</b>	
<b>2</b>	

3

What are our segments greatest pains?

What are five human “brand personality” traits that describe how we want the market to view our brand?

BRAND PERSONALITY TRAITS	
1	
2	
3	
4	
5	

What is our brand promise?

Our 25-word brand positioning statement (a statement that captures the concepts above) is:

Here is our brand story:

If you're a small company and the majority of your team participated in this section, then you may decide to use this as your internal brand audit and can jump to part 3 of this exercise.

## 2. AUDIT YOUR BRAND INTERNALLY

How do your employees and stakeholders view your brand? To gain a better understanding, conduct an internal brand audit. This will help determine if your company clearly understands your brand strategy.

The survey complexity and number of participants will depend upon your company situation. You'll want enough detail to evaluate the true perception and a large enough sample size to make sure that the results are relevant.

First, list the people who can participate in your survey. If you're sending your survey to more than 30 people, store them in a spreadsheet.

CUSTOMERS	VENDORS	EMPLOYEES

### SURVEY FORMAT

Next, determine your survey format. You have a number of options to choose from:

CHOOSE YOUR METHOD	DETAIL	PROS	CONS	
<input type="checkbox"/>	<b>Email</b>	<p><b>Use an online survey program</b> like <a href="http://www.zoomerang.com">www.zoomerang.com</a> or <a href="http://www.Surveymonkey.com">www.Surveymonkey.com</a> to launch your survey and tally your results</p>	<ul style="list-style-type: none"> <li>▶ Easy to set up</li> <li>▶ Helps you structure your survey questions</li> <li>▶ Tabulates responses</li> <li>▶ Lets you pass hidden fields to your responses so you can group them</li> <li>▶ Low cost</li> </ul>	<ul style="list-style-type: none"> <li>▶ May need to be deployed several times to get people to respond</li> <li>▶ Viewed as impersonal</li> <li>▶ Needs a compelling headline and intro to get people to participate</li> </ul>
<input type="checkbox"/>	<b>Mail</b>	<p><b>Send a self-addressed stamped envelope</b> with a cover letter and a paper survey</p>	<ul style="list-style-type: none"> <li>▶ More space to create a compelling message, to thank the customer for participating, and communicate any incentives</li> <li>▶ May be better than email for reaching customers who don't use computers</li> </ul>	<ul style="list-style-type: none"> <li>▶ Needs to look very professional</li> <li>▶ May be viewed as tedious</li> <li>▶ Doesn't fit with the "innovation" value proposition</li> </ul>
<input type="checkbox"/>	<b>Phone</b>	<p><b>Place calls directly or use a third party</b> to make impartial calls</p>	<ul style="list-style-type: none"> <li>▶ Great way to get detailed answers and probe for more information as needed</li> <li>▶ May bring to your attention unhappy customers who you can help immediately</li> </ul>	<ul style="list-style-type: none"> <li>▶ Dissatisfied customers may be uncomfortable telling employees about their issues</li> <li>▶ Customers voicing a concern to another live person often expect action to be taken immediately</li> </ul>
<input type="checkbox"/>	<b>Combination</b>	<p><b>Contact the customer via two methods</b> – for example, call or email them about a survey, then send it by mail</p>	<ul style="list-style-type: none"> <li>▶ Improving awareness will improve your response rate</li> <li>▶ Reinforces the importance you place on customer loyalty</li> <li>▶ Offers another chance to</li> </ul>	<ul style="list-style-type: none"> <li>▶ More costly</li> </ul>



CHOOSE YOUR METHOD	DETAIL	PROS	CONS
		communicate with your customers	

SURVEY FORMAT	REASONING	VENDOR

## SURVEY QUESTIONS

After choosing your delivery method, create your questions. Some suggested questions are below. They're designed as open-ended questions rather than multiple choice or ratings so that you gain true unsolicited, uncolored feedback. These work well with a fairly small group of survey recipients (as you'll need to manually evaluate each response and assign it a rating afterward), but it will lead to more accurate, actionable results.

If your survey is large, consider closed-ended questions with ratings on a scale of 1 to 5 or check boxes.

QUESTION	COMMENTS
1. What do you think {insert your product or company name} stands for?	
2. What are the key benefits {product/company} delivers?	
3. How would you describe your experience in working with {product/company}?	
4. When purchasing from/working with {product/company}, what's a word or phrase that describes what you expect from us each time?	

5. If {insert your product or company name} were a person, how would you describe him/her? What human personality traits match the brand?	
6. What is the main thing you think of when you hear {insert your product or company name}?	
7. Other	
8. Other	

## RESPONSE RATE

You don't need to collect a survey from every recipient. Instead, you're aiming for a "statistically valid sample size," or the number of responses you need to be able to confidently apply those results to your entire group of customers.

Statistics is a complex field, and consumer marketers must take into account all sorts of calculations to accurately measure and apply their results. There are a number of key metrics for a B2B marketer to consider, including

- ▶ **The total number of people** to whom you want to apply the survey results (A)
- ▶ **The % of those people who respond** to your survey (B)

When your "total number of people" (A) is very small, you need a higher percentage of them to respond (B) to be confident in your results. If A is very large, then you can confidently use a smaller percentage. Statisticians and researchers use the term "confidence rating" to indicate how statistically accurate a survey's results can be considered. 95% is a standard confidence goal.

<b>Group you're going to survey</b>	
<b>Number of potential respondents in this group (A) (population)</b>	
<b>% who should respond to the survey (B)</b>	
<b>Number of completed surveys desired (C = A*B)</b>	

It's very difficult to estimate a response rate if you haven't done a similar campaign to a similar group of people. Some factors to keep in mind:

- **A phone survey will deliver the highest response rate** but will be the most expensive survey to implement. You can probably reach 80% of your list, depending on the amount of time you spend making calls.
- **A mail survey will produce a far lower response rate than phone.** You can raise your response rate by calling or emailing recipients ahead of time and asking them to respond.
- **An email survey is very simple for participants but is subject to the same factors as any other email campaign** – you need a compelling headline and a solid message to get them to participate rather than delete. An email survey is the least personal for the recipient, and thus the recipient may not take as much care with the responses.
- **If you offer an incentive,** you can dramatically increase your response.

<b>Number of completed surveys needed (C)</b>	
<b>Projected minimum response rate (D) (as a decimal)</b>	
<b>Number of surveys to send out (C / D)</b>	

As you get ready to launch your survey, here are a few additional tips to keep in mind:

<b>TIPS</b>	<b>NOTES</b>
<input type="checkbox"/> If you're not using an online survey system, <b>set up your worksheet to tabulate your results BEFORE you finalize your survey.</b> That way you can make sure you're asking your questions in a way that can be captured and measured in your spreadsheet.	
<input type="checkbox"/> People are busy. <b>Keep the survey as short as possible.</b>	
<input type="checkbox"/> <b>Ask people to respond within a fairly short but fair period of time – for example, 10 days.</b> A deadline is important or else the piece may end up in a pile of unimportant mail.	
<input type="checkbox"/> If the deadline comes and goes and you haven't received your minimum number of surveys, <b>call or email the people who haven't responded</b> and ask them if they're willing to help you improve.	
<input type="checkbox"/> <b>Consider providing an incentive to respond.</b>	

<input type="checkbox"/>	<b>Thank recipients who invested the time to participate.</b> A personal note, a letter or even a small thank-you gift is a simple but effective gesture.	
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## RECOMMENDATIONS

When your surveys are in, tabulate them into a report and create your plan for acting on the information.

<b>Purpose of survey</b>	
<b>Date</b>	
<b>Method used</b>	

	A	B	C	D
<b>Groups targeted</b>				
<b>Number of surveys sent per group</b>				
<b>Number of completed surveys received</b>				
<b>Response rate</b>				
<b>Number of surveys needed for statistical validity / met?</b>				
<b>Confidence level</b>				

Attach a copy of the survey and a copy of the results.

### 3. AUDIT YOUR BRAND EXTERNALLY

Now, survey your customers, vendors, partners and any former customers or other external market participants you're able to reach.

Repeat the survey steps from part 2 of this exercise, but revise any of the questions to focus on the external market.

### 4. ANALYZE AUDIT RESULTS

After you've collected the results, it's time to analyze them. Your end goal is to determine if your existing brand strategy matches the market's perception and your team's perception of your brand, and if it doesn't, where are the disconnects.

<b>Survey Group</b>	
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Determine how you'll rate the responses. This depends upon the survey type and volume of responses, but your end goal is to evaluate how well the majority of the responses reflect your brand summary as outlined in section 1 of this exercise.

Rate the response to each question on the following scale:

<b>RATINGS</b>	5 = the response is an extremely strong match to your brand strategy 3 = the response is a general match to your brand strategy 1 = the response does not match your brand strategy at all
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NUMBER	QUESTION	RATING
1		
2		
3		
4		
5		
6		
7		
8		

**RESEARCH SUMMARY**

GROUP	AVERAGE RATING
<b>EMPLOYEES</b>	
<b>VENDORS</b>	

<b>CUSTOMERS</b>	
<b>OTHER</b>	
<b>ALL</b>	

### SAMPLE BEST & WORST RESPONSES

QUESTION	BEST SUPPORTING RESPONSES	BEST NON-SUPPORTING RESPONSES
1		
2		
3		
4		
5		
6		
7		
8		

### FINAL ANALYSIS

For each group, determine your results.

ANALYSIS	NEXT STEPS
<input type="checkbox"/> Yes	Congratulations! Keep up the good work.
<input type="checkbox"/> No	Continue on with the section to determine how you can strengthen your brand, and then apply it to the materials and messages you use in the market. [Corporate Identity and Messaging can help]
<input type="checkbox"/> Not sure	You may want to ask for additional feedback; however, if you're not sure, then there are probably some areas you can improve. Continue with the section to determine how you can strengthen your brand, and then apply it to the materials and messages you use in the market. [Corporate Identity and Messaging can help]

If you selected *No* or *Not Sure* for any group, outline the areas that don't match.

BRAND AREA	GROUP	INTERNAL DISCONNECT	EXTERNAL DISCONNECT

To resolve any disconnects, continue with the next exercises in Brand Strategy.

### BRAND COMMUNICATIONS

You may also wish to audit your marketing materials to determine whether you're consistently conveying your brand promise and personality.

This is also covered in greater depth in Exercise 26 – Define Your Visual Requirement if you'd like to address it there.

CORPORATE IDENTITY	Is it consistent with your brand promise?	Is it consistent with your brand personality?	NEXT STEPS
Logo	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Colors	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Stationery	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Business envelopes	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	

Mailing labels	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Other printed identity	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Other	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
<b>WEBSITE</b>			
Website	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
<b>PRINTED LITERATURE</b>			
Company brochure	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Product/service data sheets	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
White papers	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Case studies	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Reference lists	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Hard copy newsletter	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Other	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
<b>PRESENTATION MATERIALS</b>			
PowerPoint template	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Product demo	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Product sample	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Folders	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Other	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
<b>TEMPLATES</b>			
Proposal template	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Email templates	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Sales letter templates	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Other	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
<b>INTERACTIVE TOOLS</b>			
Email newsletter	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Company blog	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
RSS feed	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
Videos	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	
<b>OTHER TOOLS</b>			
ROI calculator	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N	

If some of your materials need improvement, you may want to hone your brand strategy with the rest of this section beforehand. [Sales Tools and Literature, Copywriting & Graphic Design, Website and Messaging can help.]



## Report

- 1. INTERNAL BRAND AUDIT RESULTS
- 2. EXTERNAL BRAND AUDIT RESULTS

This report summarizes our results from completing Exercise 20 – Brand Strategy: Audit Your Current Brand.

### 1. INTERNAL BRAND AUDIT RESULTS

<b>Audit Targets</b>	
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<b>Audit Type</b>	
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<b>Audit Date</b>	
-------------------	--

**Our internal brand audit revealed that:**

Any disconnects between our brand summary and our audience are as follows:

BRAND AREA	GROUP	INTERNAL DISCONNECT


To resolve any disconnects, we plan on addressing the following:

ITEM	ACTIVITY	GOAL

## 2. EXTERNAL BRAND AUDIT RESULTS

<b>Audit Targets</b>	
----------------------	--

<b>Audit Type</b>	
-------------------	--

<b>Audit Date</b>	
-------------------	--

**Our external brand audit revealed that:**

--

Any disconnects between our brand summary and our audience are as follows:

BRAND AREA	GROUP	EXTERNAL DISCONNECT

To resolve any disconnects, we plan on addressing the following:

ITEM	ACTIVITY	GOAL

ITEM	ACTIVITY	GOAL



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**If I can be personally helpful to you, let’s talk.** Looking forward to connecting!

David Newman

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