Brand Audit Outline

This project experientially integrates the material presented in lectures and cases. Working in teams (size depends on class size), students will immerse themselves in an extensive analysis of consumers of a specific brand as well as conduct research and analysis of the brand, the company that owns it and its competitors. An example of a completed brand audit appears in the Keller text (p. 280).

The team's first challenge is to identify two local brands (Saudi Brands) of mutual interest to the team. Teams are encouraged to select a brand for which public information is readily available, one that is a member of a well-known category and one whose consumers are readily accessible for research or observation purposes.

As documented in the outline appearing on the next page, there are multiple components to this research project.

1. Secondary research regarding the history of the brand/company, its current standing (SWOT analysis) and present positioning provides the foundational knowledge essential for conducting further research about the brand, its customers and its overall performance will provide the foundation of the brand audit.
2. Additional secondary research focusing on specific aspects of the brand's DNA, marketing programs and brand elements will be conducted to develop a comprehensive brand inventory.
3. The brand exploratory phase entails conducting further analysis to examine think, feel and react towards the brand from multiple perspectives. While information in this section is also compiled from existing secondary sources, teams will conduct primary research to delve into how others use and relate to the brand.
4. Integration of secondary and primary research should help students produce solid *strategic* and *tactical* recommendations proposing next steps to management for creating a competitive brand and enhancing brand equity. Recommendations might also include specific tactics outlining how these next steps may be accomplished.

NOTE: Brand managers, research managers and C-level executives are the target audience for the brand audit report. Thus, recommendations should outline important risks-reward tradeoffs and provide significant evidence to support important strategic and resource allocation decisions.

I. **Brand History and Overview**

Summarize the evolution of the brand, including its past and present positioning. The summary should briefly describe the brand/organizational values, company/brand heritage and a company/brand SWOT analysis (1 page maximum)

II. **Key Challenges Facing Brand**

Explain the key challenges facing the brand and lay the foundation for the brand audit focus and outcomes. The challenges should relate to specific aspects of the brand such as brand value, brand architecture, brand portfolio, brand extension, brand revitalization, repositioning, etc.

III. **Brand Inventory**

Provides a comprehensive assessment of the current brand strategy and strategy elements used to support the brand franchise

a. Construct the brand architecture
   i. Graphically represent the brand hierarchy
   ii. Discuss the roles of brands in the portfolio. Focus on your brand and others deemed important to your brand.
   iii. Discuss the hierarchy of the brand.
b. Analyze the firm's branding and marketing programs. How do they contribute to brand knowledge? Evaluate the consistency of the programs over time. Is there consistency between the brand and the marketing elements? Describe and evaluate the impact of any observed discrepancies.
   i. Analyze the brand aesthetics (logos, name, packaging, colors)
   ii. Analyze past and current advertising campaigns across medium.
   iii. Analyze the marketing mix for the brand.
c. Profile direct and indirect competitors and the market situation.

IV. **Brand Exploratory**

Offers a detailed analysis of consumers' brand knowledge structures based on the customer-based brand equity framework.

a. Assess brand associations at each level of the consumer-based brand equity pyramid. Critique the customer-based brand equity. What meanings are strong and dominant? Which are unique from the competition? Which are positive and negative? What meanings resonate with the target market?
b. Construct a behavioral profile of extreme users, if any, and discuss the influence of consumer emotions during the brand purchase or consumption experience.
c. Develop a consensus map to capture relevant images and metaphors associated with the brand using the ZMET technique described in the Keller text (pp 302-304).The ZMET study should include interviews from six different research participants.

Documentation of ZMET research participants' identity, research procedure, images/materials from research participants, an original mental map and other images generated during the research process must be included in an appendix.

d. Discuss key observations obtained from the ZMET study and identify key issues and opportunities to reinforce brand equity anywhere along the brand pyramid.

V. Reflections and Recommendations

Integrate research findings from the above research activities to generate marketing recommendations that address specific branding issues

Develop specific strategic and tactical recommendations that improve brand management and brand communication over the short term (i.e., 18-24 month period). Recommendations should be closely integrated to reassure brand image, awareness and equity are maximized.

VI. Bibliography

All secondary information sources such as journals, magazine articles, websites and industry reports must be properly acknowledged and formatted with in-text citations of the original source and an organized list of references. Please strictly adhere to APA guidelines for properly documenting information sources used in the final brand audit report.

NOTE: Instances of plagiarism are not governed by these bibliography guidelines, but instead will be treated as academic misconduct and handled according to JHU academic misconduct policies.

VII. Appendices

A separate appendix is required for supporting documents, including (a) visual images, copies of brand materials, links to branded multi-media materials, (b) copy of all ZMET research materials (should be condensed and organized) and (c) reports summarizing research findings.

Brand Audit Deliverables

Written Report. The Brand Audit report is a 10-page single-spaced paper. Teams must submit two copies of the brand report – a hard copy is due at the beginning of class and an electronic copy is due prior to class via Blackboard in Week 8.

The final report must conform to the following: must include a title page, table of contents, bibliography and appendices (as described above). Standard formatting must also include:

- Typewritten, single-space, numbered pages
- 1-inch margins on all four sides
- 12-point classic font
- Stapled report, with cover page containing names of all team members.

Team Presentation. In Week 8, teams will deliver a 15-minute presentation, followed by a 5-minute Q&A. Please submit both a hard and electronic copy of the presentation prior to class.

Presentations should succinctly communicate the present situation, describe the brand challenges, discuss the goal of the primary research, summarize pre-test research findings and explain proposed branding recommendations.

Brand Audit Project

Students will form teams to work on this project. Please take the time to put together a team that will work well together in terms of schedules, skillsets, goals, etc. All groups must be formed and potential brands identified by the start of the third-class session.

Your assignment is to select a real brand (new or well-established) and conduct an audit for that brand. Every team must study a different brand, so a pre-approval from me is necessary (see below). A startup that has not yet introduced a product is acceptable, so long as the product definition and potential brand strategies are sufficiently developed to allow for a meaningful audit. Feel free to pick a service (e.g., non-profit or for-profit) or product (e.g., consumer, technology, etc.)

The goal of the brand audit is to assess its sources of brand equity and suggest ways to improve and leverage that brand equity. Thus, brand audits are made up of brand inventories (comprehensive summaries of the existing marketing and branding program) and brand exploratories (the result of empirical research), followed by a recommendation for brand strategy and strategy implementation.

Brand Inventory: A current, comprehensive profile of how all products and services are marketed, branded and sold by a company.

- Identify all brand elements (logos, symbols, characters, packaging, slogans, trademarks, etc.).
- Identify the inherent attributes of the product/idea/service (pricing, communications, distribution policies, other relevant marketing activities).
- Profile direct and indirect competitive brands for points of parity and points of differentiation.
- Using all of this, gain an understanding of:
    - What customers' current perceptions might be based upon
    - Assess the consistency and continuity of marketing program
    - Assess perceptions of line and product extensions by customers and important collaborators
    - Identify brand strengths and weaknesses

Brand Exploratory: An investigation of customer brand knowledge, awareness, associations (strength, favorability, uniqueness), etc. Research activity is focused on understanding what customers think and feel about the brand and its corresponding product category, in order to identify sources of brand equity and opportunities for the future.

- Analysis of prior research studies (internal, external)
- Analysis of media interpretation of the brand and product category

- Qualitative research
- Quantitative research
- Using all of this:
    - Uncover current knowledge and feelings for the core brand and its critical competitors (existing or emerging)

    - Develop a detailed and accurate profile or "mental map" of brand knowledge structures
    - Determine depth and breadth of brand awareness, brand image and necessary points of parity and points of differentiation with respect to critical competitors

The final project will include a written proposal as well as a presentation to the entire class. Both the written and oral components of the project should summarize the key insights from the Brand Inventory and Brand Exploratory. Based upon those insights, make recommendations to best position the brand for the future: Which new brand meanings? Which existing meanings should be strengthened or eliminated? What is the optimal positioning going forward? Identify and elaborate a marketing strategy/program to deliver that recommended positioning.

Progress Reports: You will be asked to submit progress reports several times throughout the semester. The first progress report is due at the beginning of class #12. This report should sketch your preliminary vision of a "mental map" for your target brand in terms of salient brand meanings/associations and provide an outline for your qualitative research (see below). This progress report should be no longer than 2 pages, single spaced, 12-point font, 1-inch margins all around.

The second progress report is due at the beginning of class # 19. This report should summarize your most important insights from your qualitative research and sketch your preliminary plan for your quantitative research. This progress report should be no longer than 2 pages, single spaced, 12-point font, 1-inch margins all around.

Participation Assessment: Each member of the group will be asked to assess the proportion of the work that each group member contributed to the overall brand audit project. I will collect these assessments on the last day of class. This information will contribute to my final assessment of each member's final grade for the brand audit.

Final Report: The final report is due the morning of our final class meeting. In it, you should convey your vision of both a "mental map" for the brand in terms of the key brand associations. You will have conducted both qualitative and quantitative research using tools discussed in class sessions, the HBS case on Brand-Person relationships and the

readings. For your qualitative research, conduct either three one-on-one interviews or one 6-8 person focus group. For your quantitative research, conduct a survey among a larger number (30+) of customers. Your goal is to learn about the brand associations, brand relationships, sources of equity, etc. possessed by your focal brand. You will also use the insights from your research to formulate a positioning statement and perceptual map to convey the brand's ideal positioning with respect to its competitors. The final report will use all of this information to identify the sources of brand equity (and missed opportunities), thereby providing the basis for your recommendations going forward.

Page limitations: 1-page executive summary; 12 additional pages of text (single spaced, 1-inch margins all around; 12-point font); up to 5 pages of appendices/exhibits.