

# The Brand & Marketing Brief Worksheet

## The Steps Necessary To Complete A "Brand & Marketing" Audit



This Marketing brief worksheet will provide you with a roadmap to define your brand's strengths, weaknesses and opportunities. It is suggested that every employee and stakeholder perform this exercise...

**AND THAT THE INFORMATION  
SUPPLIED REMAINS  
ANONYMOUS &  
CONFIDENTIAL.**

Remember, the goal of this exercise is to help you "define" *your* brand and *your* brand's messaging to improve your business model.

*We recommend that you use this document and have the individuals place their answers below the questions. This way you can tabulate and chart the answers to create a "Summary Document".*

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## The Brand & Marketing Brief Worksheet

### Prepared For

*(Your Business Logo Here)*

Answering the questions on this worksheet will effectively build the skeleton for your Brand Platform and marketing/communications direction. The information gathered in this discovery process (client survey, research, interviews) will provide you with the answers needed to determine the initial elements associated with the overall corporate strategy. Please note: ALL INFORMATION IS CONFIDENTIAL & IS USED FOR PLANNING PURPOSES ONLY.

We have asked some questions that are typical with a SWOT Analysis. Only answer those questions that you deem relevant or use. *Please be sure to expand your thoughts and "Add" to the questions if you believe important questions/information has been omitted. We have also left space at the end of this document for you to add additional ideas or comments.*

### Project Summary:

Please state general project information, goals, and relevant background information for your marketing requirements. This paragraph should be a statement overview of the project as a whole.

1. Please tell us, in your own words, about your company?
2. What is the basic overview of the project(s)? ...This area is for what are the key initiatives that you believe need to be accomplished to facilitate growth....new products, the brand platform, etc. Briefly include background information on the key individuals that would be involved if relevant.
3. What are your primary element(s)/single purpose or goals?
4. What are your secondary goals?
5. What are your short term goals?
6. What are your long-term goals?

**Audience Profile:**

Profile the target audience. Please provide enough detail to enhance our understanding of who your audience is. Include some user demographic information if you have it. (If you don't have demographic data, you need to find it).

Your goal in answering this section is to provide the following: Who is the target? What do they care about? And what do they do on a daily basis where your product/services impact their professional/personal experiences utilizing your products/services?

1. Who is your target audience? Choose a "typical user/buyer" and profile the buyer in detail. Keep in mind that we will need an overview that includes both business profiles and individual profiles that would typically use these products. Include typical occupation, age range, gender, product usage frequency, and typical reading habits that may include both consumer or trade magazines, trade shows, entertainment likes/dislikes and any other relevant information. Profile more than one "typical buyer/user" if applicable.
2. What are typical tasks the user(s) might perform with your key products? Since you have several products, please give us a brief explanation of your key products/services that you consider key to the success of the overall goals and business model.
3. Explain how the product is currently sold and where the sales/leads come from. For instance:

• % of sales online	x%
• % of sales from in-store	x%
• % of sales thru sales calls	x%
• <u>% of sales – other</u>	<u>x%</u>
• <b>Total</b>	<b>100%</b>

**Perception/Tone/Guidelines:**

How do you want your target audience to respond to your marketing presence?

What do you believe, or know, the current audience may currently think and feel about your company, your products, your website, current communications and/or advertising campaigns and past communications and/or advertising initiatives?

1. What do you want them to think and feel?
2. Who, from a direct competitive standpoint does a good job marketing and communicating their products and services, and why?
3. Who, from within your industry/competitor, does a good job marketing and communicating their products and services, and why?
4. What adjectives can be used to describe the way you want your company to be perceived?
  - What adjectives can best describe the current perception?
5. What are some specific visual goals your marketing and communications should convey?
6. What color(s) best describes the company culture “currently”, and why?
7. What color would you like to describe your company culture, and why?

**Competitive Positioning:**

How you are different from your competition? Please describe the key factors which you believe will make your company/products a success?

1. How is your company different from your competition?
2. What elements of your products/services “specifically” set you apart from your competition?
3. What areas of your current positioning, advertising, people, website, etc., are successful, and why?

**Strengths (Answer each of these questions.)**

1. Advantages of Proposition?
2. Capabilities – Current and Future?
3. Competitive Advantages?
4. USPs – (Unique Selling Points)?
5. Resources, Assets, People?
6. Experience, Knowledge, Data?



7. Marketing – Reach, Distribution, Awareness?
8. Innovative Aspects?
9. Price, Value, Quality?
10. Cultural, Attitudinal, Behavioral?

**Weaknesses (Answer each of these questions.)**

1. Disadvantages of Proposition?
2. Gaps in Capabilities?
3. Lack of Competitive Strength?
4. Reputation, Presence and Reach?
5. Own Known Vulnerabilities?
6. Effects on Core Activities, Distractions?

**Opportunities (Answer each of these questions)**

1. Market Developments?
2. Competitors' Vulnerabilities?
3. Industry or Lifestyle Trends?
4. Technology Development and Innovation?
5. Global Influences?
6. New Markets, Vertical, Horizontal?
7. Niche Target Markets?
8. Geographical, Export, Import?
9. New Unique Selling Points?
10. Tactics – Surprise, Major Contracts, Etc?
11. Partnerships, Agencies, Distribution?
12. Volumes, Production, Economies?
13. Seasonal, Weather, Fashion Influences?

**Threats**

1. Competitor Intentions – Various?
2. Market Demand?
3. New Technologies, Services, Ideas?
4. Vital Contracts And Partners?
5. Sustaining Internal Capabilities?
6. Obstacles Faced?
7. Insurmountable Weaknesses?
8. Economy – Home, Abroad?
9. Seasonality, Weather Effects?

**Targeted Message:**

State a single-minded word or phrase will appropriately describe your expectations once the assignment is completed.

**Communication Strategy:**

How do you believe we need to convince your target audience?

1. What is the overall message you are trying to convey currently to your target audience? For example: cost-effective, secure, reliable, efficient, etc. Is it working? If yes, why? If not, why?
2. What do you believe is the best way to convey the overall message to obtain customers? For example: effective messaging through copy, creative positioning, directed path towards goals, specific offer in advertising or homepage, etc.
3. How will you measure the success of the marketing initiative? Please be fairly specific.
  - a. % increase in inquiries/leads
  - b. % increase in sales
  - c. Other, etc.

Please add any elements that you believe we need to concentrate on that may have not been addressed in this discovery.

**Sales & Sales Management**

The following questions will effectively build the skeleton for your sales management, associates, and store personnel training, processes, and metrics. These will create the foundation for aggressive, yet reachable goal setting and set the tone for true, meaningful and lasting positive change. The information gathered in this discovery process (client survey, research, interviews) will provide clarity and depth to our recent telephone conversations.

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**Goal Setting**

1. Who sets goals for store/department?
2. What sales goals are set?
3. Sales Volume, Profit, closing ratio, etc.?
4. When are sales goals set?
5. Are budgets attached to sales or other types of goals?
6. What period(s) are measured?
7. Who is measured – Individually and/or collectively?
8. What furniture categories are measured?



9. What else is measured to a goal?
10. How often are goals reviewed?
11. What type of charting is plotted?

### **Staffing and Training**

1. How many hours per month are devoted to formally training store staff?
2. How often is training performed by store personnel?
3. Percent of this training: Formal \_\_\_\_\_ Informal \_\_\_\_\_
4. Hours per month of formal training? \_\_\_\_\_
5. Hours per month of informal training? \_\_\_\_\_
6. How often is training performed by factory representatives?
7. Percent of this training: Formal \_\_\_\_\_ Informal \_\_\_\_\_
8. How often is training performed by guest speakers?
9. Percent of this training: Formal \_\_\_\_\_ Informal \_\_\_\_\_

Please circle topics covered in training and designate F=Formal I=Informal B=Both.

Company history	Company culture	Procedures and process
Product knowledge	New product training	Competitive product
Selling techniques	Active listening	Demonstration skills
Problem solving		

Please rank the following by most to least topics covered in formal training. Use #1 for the most often covered topic and so on to 10.

Company history	Company culture	Procedures and process
Product knowledge	New product training	Competitive product
Selling techniques	Active listening	Demonstration skills
Problem solving		

### **Merchandising**

1. Are all items tagged individually?
2. If practical, are all vignettes tagged as a group, collection or as displayed?
3. Are alternate package pricing available in vignette?
4. Are financing offers (Dollars per month, week, etc.) displayed on signage?
5. Are special, featured, or discounted items tagged the same on the floor as current goods?
6. Are alternative colors, fabrics, finishes shown other than by picture?
7. Are best sellers prominent?
8. Are they identified as such on floor?
9. Are featured items prominent?
10. Are they identified as such on floor?
11. Are markdowns shown “was” / “is” pricing on signage?
12. Is sale theme carried out through entire store?

### **Display**

1. How often are vignettes changed or moved?
2. Are displays fully operational?
3. Curios lighted, lamps lit, etc.?
4. Are feature call outs on product?
5. Hidden switches, hidden storage, etc.?
6. Who inspects floor display conditions?
7. Who cares for display during open hours?

### **Customer Relations**

1. Are your T&C (terms and conditions) displayed?
2. Are your T&C explained to every customer?
3. Who helps the customer with financing paperwork?
4. How long does it take to approve most financing?
5. Once a customer decides to purchase, how long does it take to complete the sale paperwork?



6. Who contacts the customer post sale if there are questions or problems?

Indicate a specific date that you would ideally like the project completed.

Feel free to contact us should you have any questions or concerns pursuant to the above questions.

Please add any elements that you believe we need to concentrate on that may have not been addressed in this discovery.

Thank you for your answers. Should you have any questions, please feel free contact us.

If you have any questions, please feel free to contact us. You can also request an example of how this brief was completed by one of our clients, and how it led them to a 40% increase in sales in their first 9 months after the process was completed.

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**About Bill Napier:** Bill is a specialist in creating, guiding and deploying successful marketing B2B & B2C solutions integrating traditional marketing strategies with the web and social media. He has worked in the home furnishings industry for over 12 years, as the Chief Marketing Officer for some of the industry's largest manufacturers. He has also responsible for creating and executing the largest retail based promotions ever launched within the industry.

Examples of his work can be viewed [HERE](#):

Additional articles Bill has written can be viewed [HERE](#):

