DIY Brand Audit

A series of lists, questions, and tips to help your conduct an internal brand audit.

blue green.

A brand audit is comprehensive review of a company's brand. It can be dialed up or down to meet your goals: from a visual look at key touchpoints, to a deep dive on how everyone experiences your brand.

The insights from a brand audit can help make informed decisions, pinpoint issues, and spot opportunities to capitalize on.

Why do a brand audit?

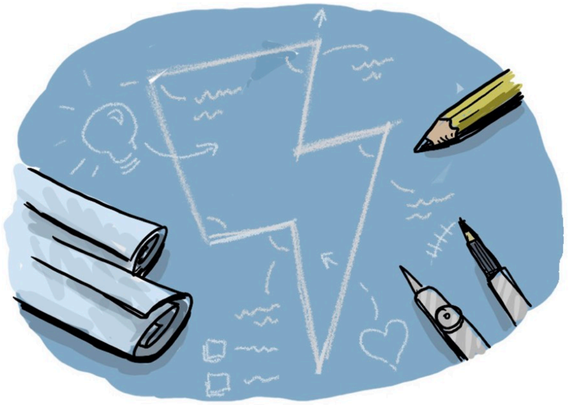
A brand audit is invaluable any time you need to understand how your brand communicates, how it's perceived, or how it aligns with your business goals.

It may be a one-off initiative to prepare for a rebrand, or part of ongoing brand management efforts.

Conducting a successful brand audit

Set clear goals for the audit, and scale the process to meet your needs. Here's how we like to do it:

1. **Mobilize**
2. **Gather**
3. **Assess**
4. **Follow Thru**



If you need help developing your brand strategy or identity, use our DIY Brand Blueprint (or just hire us!).

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Don’t go it alone. Involve your team, and let them know what to expect through clear communications. It helps to have participation from all areas of the business – make your brand audit a team sport.

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Hunting and gathering starts with the obvious: collect ads, marketing collateral, website content, social media profiles, customer feedback, and brand guidelines.

Looking for something a bit extra? Use the checklist on the next page to generate more ideas.

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A brand audit checklist to get you started:

MARKETING / COLLATERAL:

- ✓ WEBSITE
- ✓ SOCIAL MEDIA PAGES, POSTS & PROFILES
- ✓ CONTENT/EDITORIAL OUTPUT
- ✓ TAGLINE/SLOGANS & KEY MESSAGING
- ✓ VIDEOS
- ✓ TRADE SHOW PROPERTIES & MATERIALS
- ✓ SWAG
- ✓ ADS

SALES:

- ✓ SALES TOOLS: DECKS, PRESENTATIONS, PROCESS, SCRIPTS
- ✓ SALES TRAINING MATERIALS & PROCESS
- ✓ SALES RIDEALONGS

CUSTOMER EXPERIENCE:

- ✓ CUSTOMER PROGRAMS, COMMUNICATIONS
- ✓ PRODUCT UX, DOCUMENTATION, SUPPORT
- ✓ ACCOUNT SERVICE POLICIES & PROCEDURES
- ✓ EMAIL & COMMS STRATEGY, CONTENT & CHANNELS

INTANGIBLES:

- ✓ PARTNERSHIPS & COLLABORATIONS
- ✓ CRISIS MANAGEMENT
- ✓ CUSTOMER & EMPLOYEE PERCEPTIONS

FACILITIES & FIELD:

- ✓ PHYSICAL SPACE
- ✓ SIGNAGE
- ✓ SHIPPING PACKAGING
- ✓ VEHICLES
- ✓ UNIFORMS & APPAREL

BUSINESS MATERIALS:

- ✓ CONTRACTS
- ✓ TEMPLATES
- ✓ BUSINESS CARDS: PRINTED & DIGITAL
- ✓ HR MATERIALS SUCH AS RECRUITING ADS, HANDBOOKS, INTERVIEW TOOLS & PROCESSES
- ✓ VOICEMAIL GREETING
- ✓ EMAIL TEMPLATES AND AUTOMATED REPLIES

INTERNAL & TALENT ACQUISITION:

- ✓ EMPLOYEE ENGAGEMENT PROGRAMS & ACTIVITIES
- ✓ TRAINING
- ✓ POLICIES, PROCEDURES & PROCESSES
- ✓ EMPLOYEE MANUAL AND HR MATERIALS
- ✓ INTERNAL COMMS CHANNELS & CONTENT
- ✓ BENEFITS & PERKS
- ✓ INTRANET & BUSINESS SOFTWARE/SYSTEMS
- ✓ RECRUITING ADS, INTERVIEW TOOLS & PROCESSES

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Once you've pulled that together, time to assess your brand. Some questions to ask:

1. Are we living up to our business and brand goals?
2. Is our value prop and messaging still relevant and accurate?
3. Is there any confusion about our name(s), products, or what we do?
4. Are we telling our story in a compelling way? How do we know, do we ask customers or track analytics?
5. How well do our comms and programs align with our mission and values?
6. Does our brand expression (design and writing) follow guidelines?
7. Do we present ourselves consistently to all stakeholders, across all media and geographies? Anything stick out?
8. Are any of our materials out of date?
9. Are our brand guidelines up to date? Do we need to make any additions or changes since last time?
10. Are we in compliance with regulatory and trademark requirements?

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Now what? Here are more resources for things related to brand audits, including when they're worth it and what comes next.

MESSAGING CONSISTENCY ISN'T SEXY, BUT IT SELLS

Five tips for messaging consistency to help make an impression, fill your funnel, convert sales, build equity.

Read the full article.

MANAGING A CORPORATE REBRAND, TWO-PART SERIES

Most rebranding efforts fail, for a variety of reasons. In part 1 of 2 on managing a corporate rebrand, we explore warning signs and pitfalls. Part 2 shows how to increase the chances of success through internal engagement.

Read part 1 or the series here. And part 2 here.

B2B BRAND STEWARDSHIP: MANAGE NOW OR PAY LATER

Companies that invest in brand consistency often increase customer loyalty and trust, competitive advantages and market share. For those that don't, the cost may be significantly higher down the road.

Read the full article.

Need more help? We offer custom workshops and brand strategy engagements for ambitious marketing leaders. If that's you, drop us a line.

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