

## Brand Architecture Research Guide: Comprehensive Checklist

### Purpose:

This checklist is designed to guide you through the essential steps of researching and gathering data for building or restructuring your brand architecture. From brand audits to competitive analysis, each section will ensure you have the information needed to make informed decisions about your brand portfolio and strategy.

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### 1. Conduct a Brand Audit

Performing a brand audit is the first step in understanding where your business stands and identifying improvement areas. This involves reviewing both internal and external aspects of your brand(s) and determining the health of your overall brand portfolio.

#### Checklist for Brand Audit:

- **Internal Brand Review:**
  - Review your company's mission, vision, and core values.
  - Document your brand's current identity (visual elements, messaging, and tone).
  - List all brands and sub-brands in your portfolio.
  - Identify brand roles: master brands, sub-brands, endorsed brands, etc.
  - Analyze brand equity for each brand (how much value each brand contributes to the overall portfolio).
- **External Brand Review:**
  - Assess current brand awareness in the market.
  - Conduct a perception audit (how your customers and competitors view your brand).
  - Evaluate customer feedback and online reviews for brand consistency and performance.

- Review any existing public relations or media mentions.
  - **Brand Performance Metrics:**
    - Analyze financial performance (revenue, market share, profitability) for each brand.
    - Review marketing performance (ad spend, return on investment, customer acquisition costs).
    - Examine brand loyalty (customer retention rates, repeat purchases, etc.).
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## 2. Segment the Market

To create an effective brand architecture, you need to understand who your customers are and how your various brands or sub-brands meet their specific needs. Market segmentation is crucial for tailoring your brand architecture to distinct target audiences.

### Checklist for Market Segmentation:

- **Demographic Data:**
    - Gather data on customer age, gender, income, and education levels.
    - Identify geographic locations where each brand is most popular.
    - Analyze how different demographics interact with your brands or sub-brands.
  - **Psychographic Segmentation:**
    - Identify customer lifestyle preferences, values, interests, and attitudes.
    - Understand the motivations driving purchase decisions for each segment.
  - **Behavioral Segmentation:**
    - Determine purchasing habits (frequency, volume, seasonality) for each segment.
    - Analyze how customers use your products or services.
    - Examine customer loyalty and brand switching behavior.
  - **Customer Journey Mapping:**
    - Map the end-to-end customer experience, including touchpoints with each brand.
    - Identify gaps or inconsistencies in the experience across your portfolio.
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### 3. Competitive Analysis

Understanding how your competitors structure their brands can provide valuable insights into opportunities for differentiation and growth. A thorough competitive analysis helps ensure your brand architecture stands out in a crowded market.

#### Checklist for Competitive Analysis:

- **Identify Key Competitors:**
    - List your main competitors across the industries and markets where you operate.
    - Break down competitors by their brand architecture model (Branded House, House of Brands, Hybrid, Endorsed Brands).
  - **Analyze Competitor Brands:**
    - Study the number of brands or sub-brands each competitor manages.
    - Examine the brand equity and positioning of each brand.
    - Review visual identities (logos, color schemes, taglines) to identify gaps or opportunities.
    - Evaluate the messaging consistency across competitors' brands.
  - **Market Share and Brand Performance:**
    - Analyze competitors' market share and revenue breakdown for each brand.
    - Review their marketing campaigns and ad spend.
    - Identify which competitor brands have the most loyalty and recognition.
  - **SWOT Analysis for Each Competitor:**
    - Identify strengths, weaknesses, opportunities, and threats for each competitor brand.
    - Highlight where your brand architecture can surpass theirs (differentiation, customer loyalty, product/service offerings).
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### 4. Evaluate Customer Satisfaction

Customer satisfaction directly impacts your brand architecture decisions. Understanding which brands deliver the most value to customers and which need improvement will help you refine or restructure your portfolio effectively.

#### Checklist for Customer Satisfaction:

- **Customer Satisfaction Surveys:**
    - Design and distribute surveys focusing on brand perception, product quality, customer service, and brand loyalty.
    - Use Net Promoter Score (NPS) to gauge brand advocacy levels.
    - Review customer satisfaction scores for each brand and sub-brand.
  - **Customer Feedback Channels:**
    - Collect customer feedback from multiple sources (social media, email, live chat, etc.).
    - Evaluate customer complaints and identify recurring issues.
  - **Customer Sentiment Analysis:**
    - Perform sentiment analysis on customer reviews and online comments.
    - Identify which brands generate the most positive or negative sentiment.
  - **Brand Advocacy:**
    - Measure how likely customers are to recommend your brand to others.
    - Track referral rates and customer-generated content (reviews, social media shares).
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## 5. Synthesize the Data and Inform Brand Architecture Decisions

Once all data has been gathered, it's essential to organize and synthesize the findings to guide brand architecture decisions. This final step will help you decide which brands to keep, merge, reposition, or eliminate, and which architecture model (Branded House, House of Brands, Hybrid, or Endorsed Brands) best suits your needs.

### Checklist for Synthesizing Data:

- **Organize Findings:**
  - Compile the data from brand audits, market segmentation, competitive analysis, and customer satisfaction studies.
  - Identify key themes and patterns.
- **Make Strategic Decisions:**
  - Determine whether each brand should stay, be repositioned, or be discontinued.
  - Decide which brands should take on a more dominant role and which should be supporting brands.

- Choose the most appropriate brand architecture model based on your research.
  - **Develop Brand Guidelines:**
    - Create brand guidelines that clearly define the visual identity, messaging, and customer experience for each brand in your architecture.
    - Ensure the guidelines align with your company's overall mission, vision, and values.
  - **Test Your Brand Architecture:**
    - Run simulations to see how your new brand architecture would function in real-world scenarios.
    - Seek feedback from stakeholders and customers to refine your structure further.
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By following this comprehensive checklist, you will have all the essential data and insights to create a cohesive, strategically sound brand architecture. Whether restructuring an existing portfolio or building one from the ground up, this guide will help you make informed decisions that drive growth and strengthen your overall brand equity.