Introduction to EquiBrand Consulting

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EquiBrand is a management consultancy driving brand and business growth

- Client needs direct our service offerings

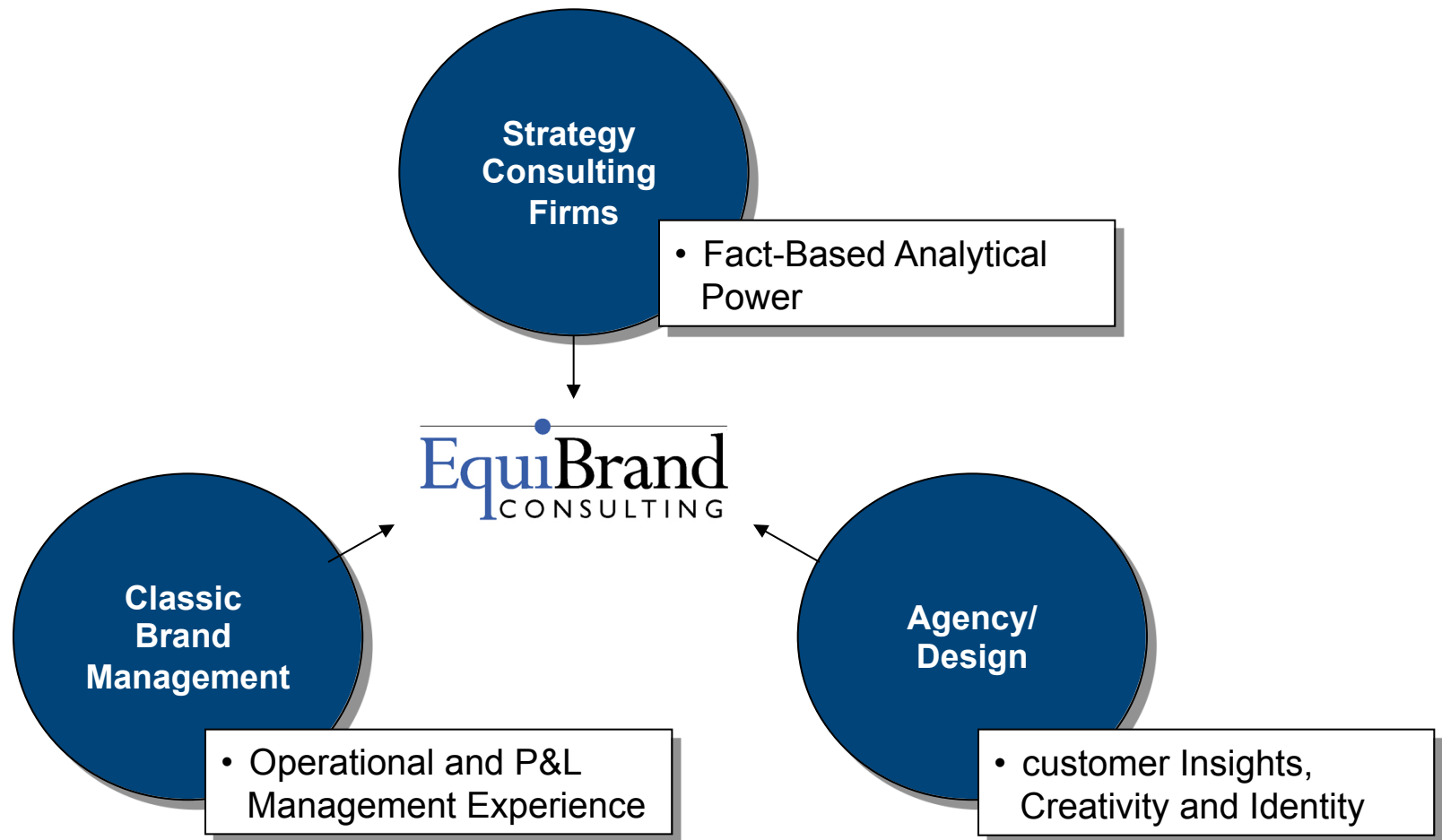| **Client need or situation**	**EquiBrand focus areas**	**Related service offerings**
To achieve competitive advantage through a deeper level of customer understanding	**Insight**	■ Market and competitive assessment ■ Quantitative and qualitative research (e.g., segmentation)
To create actionable strategies and plans to optimally position the business and brand	**Identity**	■ Brand positioning ■ Product portfolio planning ■ Brand management
To develop and launch new platforms to drive profitable growth	**Innovation**	■ Strategic growth planning ■ New product development ■ Brand equity extension

EquiBrand helps its clients improve business performance by focusing on *integrated, upstream marketing*

- EquiBrand successfully blends fact-based decision making, creativity and an operational mindset

Strategy Consulting Firms

- Fact-Based Analytical Power

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Classic Brand Management

- Operational and P&L Management Experience

Agency/ Design

- customer Insights, Creativity and Identity

EquiBrand team members have consulted for a wide range of clients

- Our clients come from a variety of industries and range from start-ups to well-established global brands
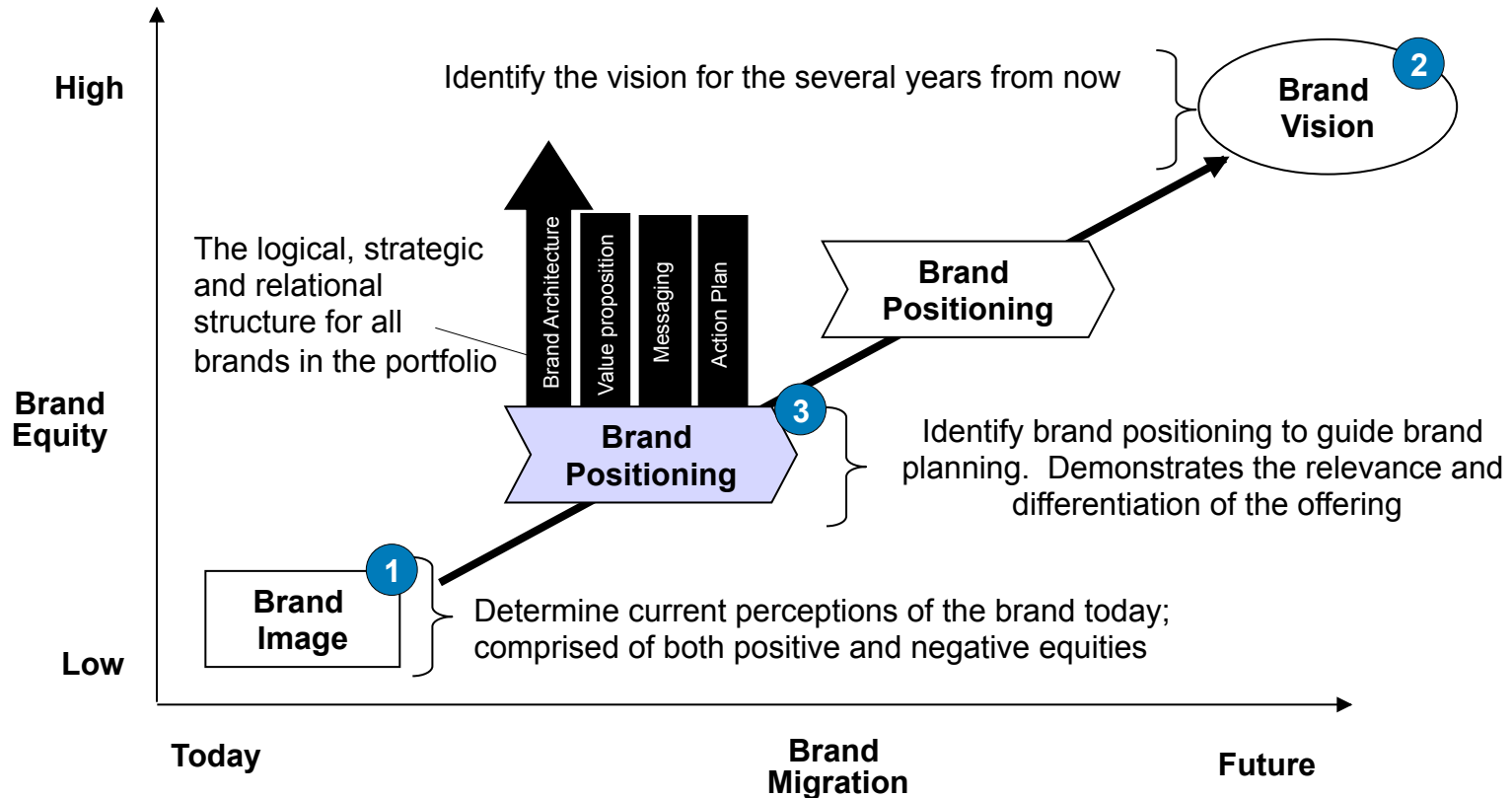
Why EquiBrand?

EquiBrand...

- ... employs a **market-driven approach**, to ensure decision-making is based on marketplace perspectives

  - Key question: *What do you know about your important customers that your competitors don't know?*

- ... is **completely objective** in tactical recommendations, as the firm holds no vested interest in downstream implementation services such as creative design or media

- ... team members bring **a broad and diverse set of skills** to the table, including classic agency/marketing, strategic consulting and product management skills

  - The consultants you meet with initially are the consultants who will be working on your business

- ... is uniquely experienced. The firm's professionals have **successfully launched, positioned and repositioned dozens of brands** across a broad range consumer products and services, business-to-business, healthcare and other categories

- ... uses **a collaborative approach** that streamlines project timelines, facilitates internal buy in and results in skills transference

EquiBrand employs a disciplined approach in building strong brands and businesses

■ Three points in time need to be considered: 1) today; 2) the future vision and 3) the brand strategy, plan and tactics to close the gap


Brand Equity (vertical axis: High, Low)

Identify the vision for the several years from now

Brand Vision ②

The logical, strategic and relational structure for all brands in the portfolio

Brand Architecture · Value proposition · Messaging · Action Plan

Brand Positioning

③ Identify brand positioning to guide brand planning. Demonstrates the relevance and differentiation of the offering

Brand Positioning

① **Brand Image** — Determine current perceptions of the brand today; comprised of both positive and negative equities

Today — Brand Migration — Future

Project deliverables depend upon individual client situations, and may include the following

■ A project proposal is the first step in clarifying objectives, activities and outputs
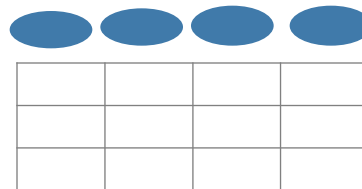
Common Project Deliverables
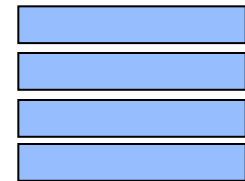
Market Assessment
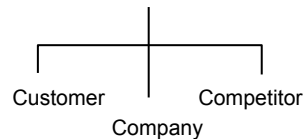
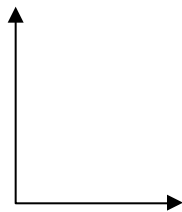Assessment of Customer, Company and Competitor dynamics

Customer Framework

A framework aligning distinct target audience segments and their needs
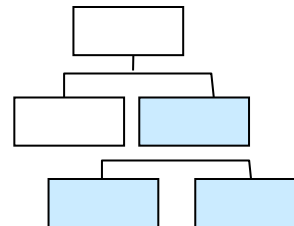
Value Proposition

A statement of strategy to target customers – the benefits you want to stand for and deliver on
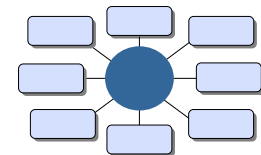
Strategic Positioning

The conceptual place you want to own, maximizing relevancy and differentiation

Brand Architecture

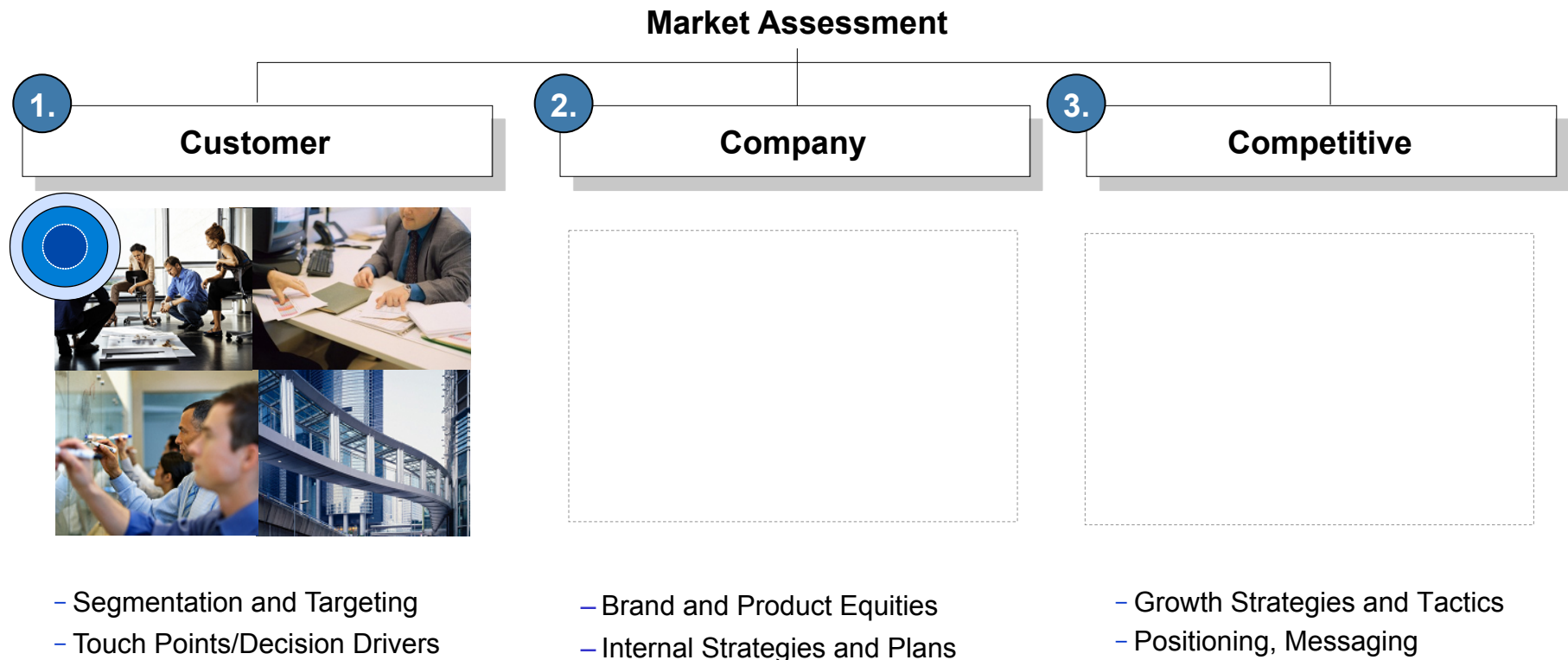The logical, strategic and relational structure for all brands in the portfolio

Marketing Strategy and Plan

The plan for delivering the strategy, including strategically aligned programs and touchpoints

Market assessment includes a situational review, from three important perspectives

- Customers, Company and Competitors are assessed via internal interviews, synthesis of internal documents (plans, research, etc.) and a competitive "brand scan"

Market Assessment

1. **Customer**

2. **Company**

3. **Competitive**

- Segmentation and Targeting
- Touch Points/Decision Drivers

- Brand and Product Equities
- Internal Strategies and Plans

- Growth Strategies and Tactics
- Positioning, Messaging

Brand architecture is the logical, strategic and relational structure for all brands in the portfolio

Brand architecture overview

- Customers relate to brands at several levels
  - Master brand → Product brands → Product descriptors
- This allows an organization to create a brand portfolio that appeals to distinct segments or need states
  - Apple vs. Mac vs. iPod vs. iPhone vs. iPhone Nano vs. iPad
  - Coke vs. Diet Coke vs. Caffeine Free Diet Coke
- The master brand often carries emotional benefits, with product brands conveying rational benefits and target-specific relevance

Brand architecture objectives

- Key objectives include improved clarity, synergy and brand leverage
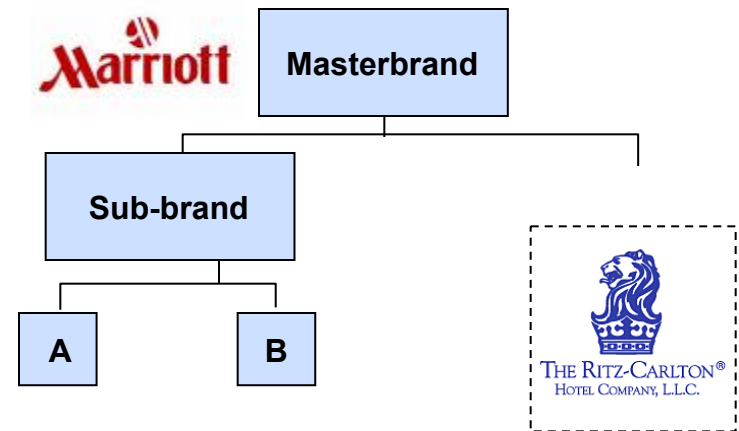
The *value proposition* should be developed to align key benefits with target market needs

- The value proposition drives strategies and actions across the organization, and consists of three parts:

1. Customer Need/ Situation	*2. Customer Value "Planks"*	*3. Operational Strategies*
– Actionable insights related to the customer situation both today and in the future	– The set of enduring strategies or benefit "planks" that fulfill customer needs	– Specific strategies, plans and tactics that deliver against desired benefits

Value Proposition "Planks"

Benefit #1

**Benefit #2**

Benefit #3

Benefit #4

Benefit N
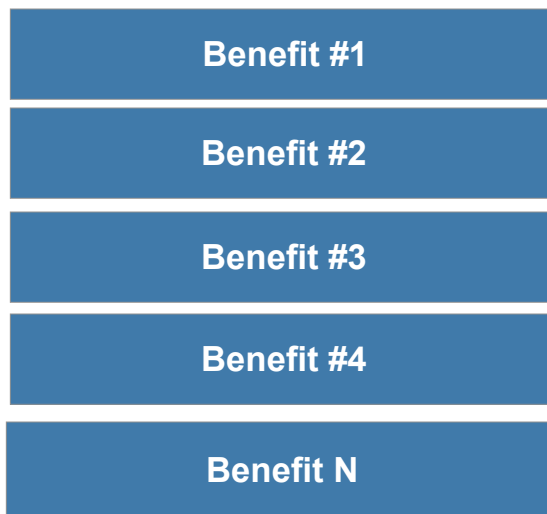
An enduring value proposition:

- ✓ Creates a multi-dimensional definition of value
- ✓ Provides direction to the business and brand
- ✓ Forces a disciplined approach to resource allocation
- ✓ Drives strategies and actions across the organization
- ✓ Creates organizational alignment

Brand positioning brings focus and clarity to the development of marketing strategy and tactics
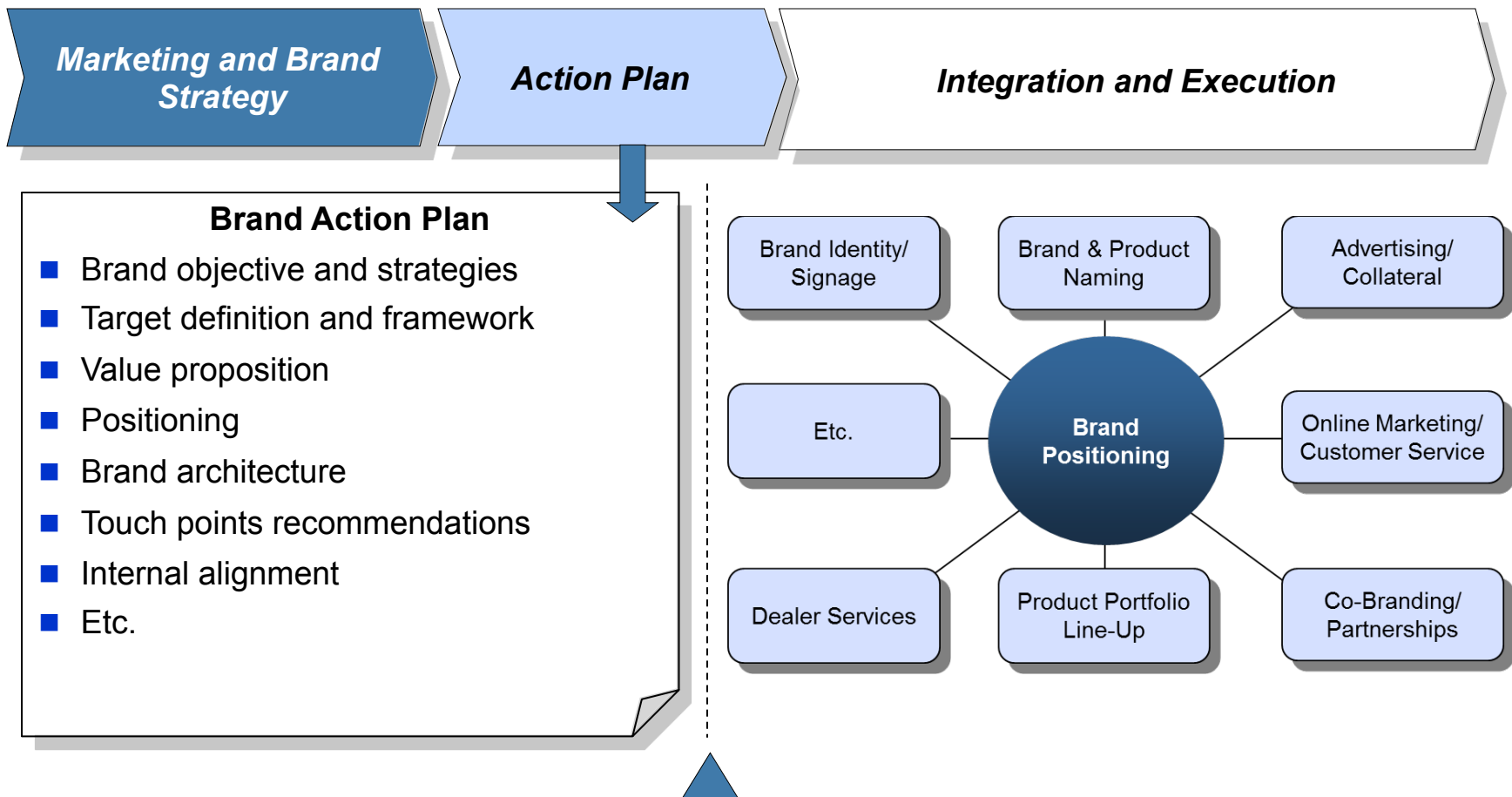
- Every decision that is made regarding the brand should be judged by how well it supports the positioning
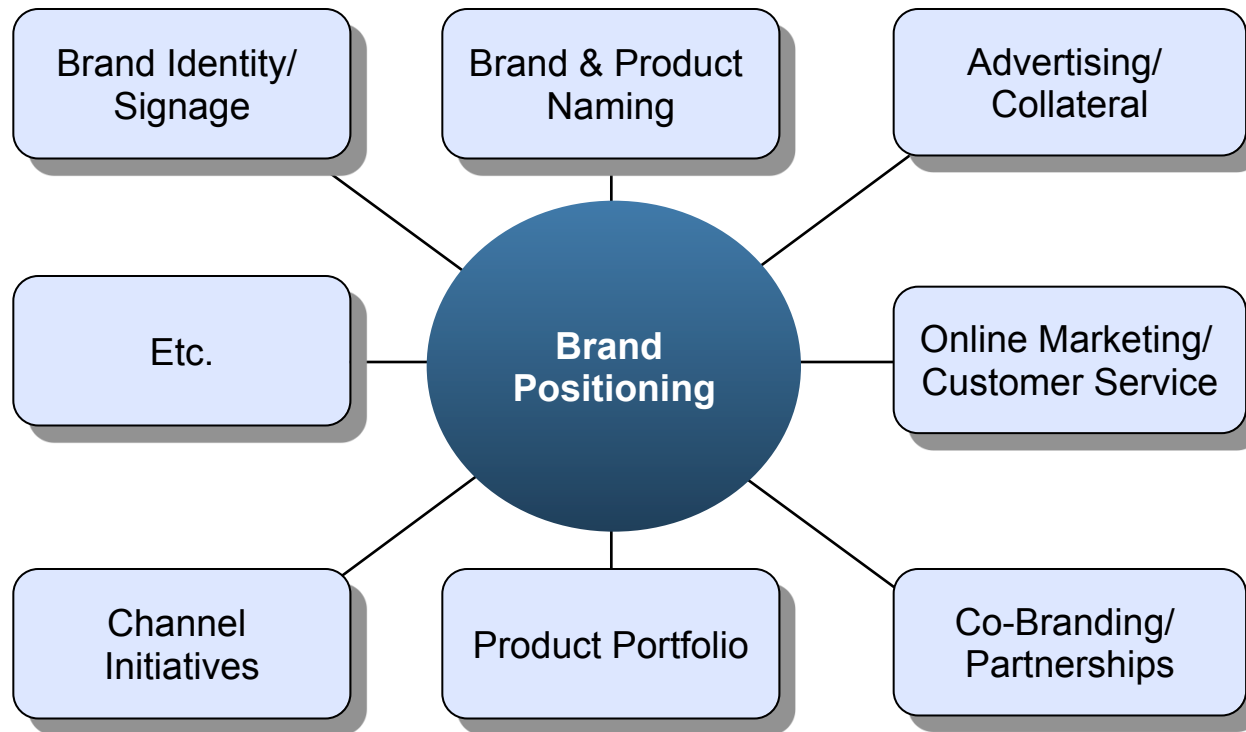
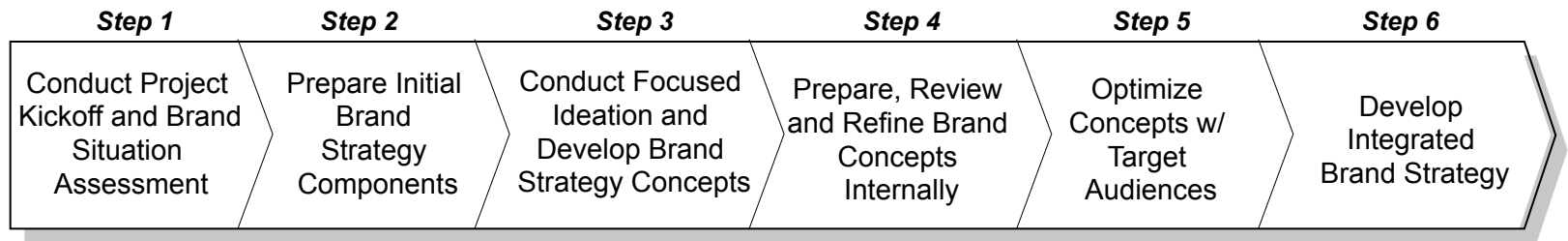**Positioning is developed as an *internal statement* of strategy to guide *external* implementation**

Marketing strategy and action plan synthesizes prior step outputs and defines next steps for delivering the brand in the marketplace

■ The strategy and action plan is used to direct internal and external actions in implementing the brand strategy
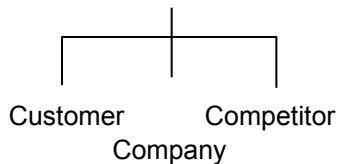
| Marketing and Brand Strategy | Action Plan | Integration and Execution |

Brand Action Plan

- Brand objective and strategies
- Target definition and framework
- Value proposition
- Positioning
- Brand architecture
- Touch points recommendations
- Internal alignment
- Etc.

Brand Identity/ Signage

Brand & Product Naming

Advertising/ Collateral

Etc.

Brand Positioning

Online Marketing/ Customer Service

Dealer Services

Product Portfolio Line-Up

Co-Branding/ Partnerships

Potential project approach

- Consulting projects are designed to be collaborative and market-driven, based on a variety of inputs

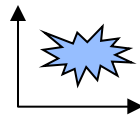| *Step 1*	*Step 2*	*Step 3*	*Step 4*	*Step 5*	*Step 6*
Conduct Project Kickoff and Brand Situation Assessment	Prepare Initial Brand Strategy Components	Conduct Focused Ideation and Develop Brand Strategy Concepts	Prepare, Review and Refine Brand Concepts Internally	Optimize Concepts w/ Target Audiences	Develop Integrated Brand Strategy

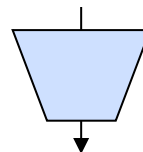**Key issues to address:**

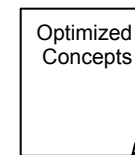| What do we know about the 3 C's?	What are hypothesized value proposition, architecture and positioning?	What are viable brand concept alternatives (in expressing intended direction)?	Which alternatives hold the strongest appeal? What's required to deliver?	Which concepts are most relevant and differentiated?	What is the recommended integrated brand strategy?

Customer   Competitor
Company

Optimized Concepts
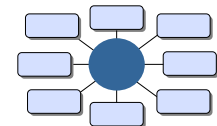
Key Interaction Points

On-site kickoff and interviews	Interim Workshop	Focused Ideation	Internal focus groups	External focus groups	Review and Refinement

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Typical marketing strategy and brand strategy project benefits

- A brand image assessment, including strengths and weaknesses, aligned by customer segments across markets (qualitative or quantitative)

- A clear, credible and customer-informed brand vision to serve as a touchstone for the organization going forward

- A relevant, differentiated and integrated value proposition and positioning designed to maximize customer relevancy and competitive differentiation

- The recommended brand architecture, including guiding principles, brand/product classification and product naming decision-tree

- A brand action plan, including next steps for transitioning to creative implementation

- Shared enthusiasm and internal buy-in across the organization for delivering an integrated brand, based on group identification and resolution of key issues

- Enhanced internal marketing capabilities and processes to support brand architecture management going forward

- Improved efficiencies, accelerated implementation and increased return on investment through better coordination of marketing efforts