



## Brand Audit Template

### OBJECTIVE

Use this template to assess your brand's current state and identify what kind of work you need: a refresh, rebrand, or repositioning. This takes about 60-90 minutes to complete. Get input from your leadership team, sales, and a few key customers if you can.

### Section 1: Business Performance Indicators

These metrics tell you if your brand is doing its job from a business perspective.

#### Customer Acquisition Metrics

##### Customer Acquisition Cost (CAC) trend:

- Current CAC: \$ \_\_\_\_\_
- CAC 12 months ago: \$ \_\_\_\_\_
- Trend: ☐ Increasing ☐ Stable ☐ Decreasing

##### Time to close (average sales cycle):

- Current: \_\_\_\_\_ days
- 12 months ago: \_\_\_\_\_ days
- Trend: ☐ Longer ☐ Same ☐ Shorter

##### Win rate:

- Current win rate: \_\_\_\_\_ %
- 12 months ago: \_\_\_\_\_ %
- Trend: ☐ Declining ☐ Stable ☐ Improving

#### Customer Value Metrics

##### Average deal size:

- Current: \$ \_\_\_\_\_
- 12 months ago: \$ \_\_\_\_\_
- Trend: ☐ Declining ☐ Stable ☐ Increasing

##### Customer Lifetime Value (LTV):

- Current LTV: \$ \_\_\_\_\_
- 12 months ago: \$ \_\_\_\_\_
- Trend: ☐ Declining ☐ Stable ☐ Increasing

##### Net Promoter Score (NPS):

- Current NPS: \_\_\_\_\_
- 12 months ago: \_\_\_\_\_
- Trend: ☐ Declining ☐ Stable ☐ Improving

#### Market Position Metrics

##### Market share (if available):

- Current: \_\_\_\_\_ %
- 12 months ago: \_\_\_\_\_ %



- Trend: ☐ Declining ☐ Stable ☐ Growing

**Unaided brand awareness (if measured):**

- Current: \_\_\_\_\_%
- Target: \_\_\_\_\_%

**Primary competitors you're losing to:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Why are you losing? (ask your sales team)**

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**Section 2: Brand Clarity Assessment**

Answer honestly. If you're not sure, that's usually a "no."

**Positioning Clarity**

**Can you clearly articulate what makes your company different from competitors?** ☐ Yes, easily ☐ Somewhat ☐ Not really

**Write your differentiation in one sentence:**

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**Can your sales team articulate your differentiation consistently?** ☐ Yes ☐ Sometimes ☐ No

**Can your customers articulate what makes you different?** ☐ Yes ☐ Sometimes ☐ No

**When you lose deals, is the reason clear and consistent?** ☐ Yes ☐ Sometimes ☐ No

**What reasons do you hear?**

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**Target Audience Clarity**

**Who is your ideal customer? Be specific.**

Industry: \_\_\_\_\_ Company size: \_\_\_\_\_

Title/role: \_\_\_\_\_ Key pain point: \_\_\_\_\_

**What percentage of your marketing is targeted at this ideal customer?**

☐ 75-100% ☐ 50-75% ☐ 25-50% ☐ Less than 25%



**Do you have clear customer personas?**

☐ Yes, and we use them ☐ Yes, but we don't use them ☐ No

### Value Proposition Clarity

**Complete this sentence: We help [audience] to [outcome] by [unique approach].**

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**Is this value proposition on your homepage?**

☐ Yes, clearly ☐ Sort of ☐ No

**Is it in your sales deck?**

☐ Yes, clearly ☐ Sort of ☐ No

**Could a competitor say the same thing?**

☐ Yes (that's a problem) ☐ No

## Section 3: Brand Perception Audit

### External Perception

**How do customers describe you? (Ask them or review testimonials)** Common words/phrases:

1. 

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2. 

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3. 

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**How do you WANT to be described?** Aspirational words/phrases:

1. 

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2. 

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3. 

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**Gap between current and desired perception:**

☐ Large gap ☐ Moderate gap ☐ Small gap

**What does your sales team hear most often in discovery calls?**

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**What objections come up repeatedly?**

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### Internal Perception



**When employees are asked "What makes us different?" do they give consistent answers?**

☐ Yes ☐ Somewhat ☐ No

**Are employees proud of the brand?**

☐ Yes ☐ Somewhat ☐ No

**Evidence of this:**

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**Would your best employees use your brand in their LinkedIn profiles?**

☐ Yes ☐ Some would ☐ No

## Section 4: Competitive Position Analysis

### Competitive Landscape

**List your top 3 competitors:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**For each competitor, answer:**

**Competitor 1:** \_\_\_\_\_

- What position do they own? \_\_\_\_\_
- How do they differentiate? \_\_\_\_\_
- Are they winning because of brand, product, or price? \_\_\_\_\_

**Competitor 2:** \_\_\_\_\_

- What position do they own? \_\_\_\_\_
- How do they differentiate? \_\_\_\_\_
- Are they winning because of brand, product, or price? \_\_\_\_\_

**Competitor 3:** \_\_\_\_\_

- What position do they own? \_\_\_\_\_
- How do they differentiate? \_\_\_\_\_
- Are they winning because of brand, product, or price? \_\_\_\_\_

### Your Position

**What position do you own in the market?**

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**Be honest: Is this position defensible and valuable?**



☐ Yes ☐ Somewhat ☐ No

**If someone Googles your category, does your brand come up?**

☐ Yes, top 3 ☐ Yes, but not top 3 ☐ No

**Do you own any unique terms, frameworks, or concepts in your category?**

☐ Yes ☐ No

**What are they?**

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## Section 5: Message Consistency Check

### Message Audit

**Go to your homepage. What's the main headline?**

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**Go to your LinkedIn company page. What's the tagline/description?**

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**Open your sales deck. What's on slide 2 or 3?**

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**Are these messages consistent with each other?**

☐ Yes ☐ Somewhat ☐ No

### Content Audit

Pull up your last 5 pieces of marketing content (blogs, ads, emails, etc.)

**Could a competitor publish the same content?**

☐ No, it's clearly ours ☐ Maybe ☐ Yes, definitely

**Does your content have a distinct point of view?**

☐ Yes ☐ Sometimes ☐ No

**Example of your POV:**

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**What percentage of your content is about you vs. about your customer's challenges?**

About us: \_\_\_\_% | About customer: \_\_\_\_%



## Section 6: Visual Identity Evaluation

### Current State

**When was your current brand identity created?** Year: \_\_\_\_\_

**Does your visual identity feel:**

☐ Modern ☐ Dated ☐ Timeless

**Is your logo used consistently across all channels?**

☐ Yes ☐ Mostly ☐ No

**List all the logo variations currently in use:**

1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_
- (More than 3? That's a problem)

**Do you have brand guidelines?**

☐ Yes, and people use them ☐ Yes, but nobody uses them ☐ No

**When was the last time someone used off-brand colors or fonts?**

☐ This week ☐ This month ☐ Rarely happens

### Visual Differentiation

**Pull up your homepage and 3 competitors' homepages side by side.**

**If you removed all logos, could someone tell which is yours?**

☐ Yes ☐ Maybe ☐ No

**What visual elements make you distinct?**

☐ Color palette ☐ Typography ☐ Photography style ☐ Graphic elements ☐ None

**Do your brand colors appear in your category's top 10 companies?**

☐ No, they're unique ☐ Yes, but used differently ☐ Yes, very similar



## Section 7: Market Evolution Check

### Market Changes

**Has your market changed significantly in the past 2-3 years?**

☐ Yes, dramatically ☐ Somewhat ☐ No

**What's changed?**

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**Has your company changed significantly?**

☐ Yes (new services, acquisitions, pivots) ☐ Somewhat ☐ No

**What's changed?**

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**Does your current brand reflect who you are today?**

☐ Yes ☐ Somewhat ☐ No, we've outgrown it

### Future State

**Where do you want to be in 3 years?**

Revenue target: \$\_\_\_\_\_

Market position: \_\_\_\_\_

Customer base: \_\_\_\_\_

**Can your current brand take you there?**

☐ Yes ☐ Maybe ☐ No

**Why or why not?**

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## Section 8: Scoring and Interpretation

Count your responses in each category:

### Brand Strategy Health

Questions from Sections 2-5 about clarity, perception, and position.

#### Red flags (each counts as -2 points):

- Can't clearly articulate differentiation: ☐
- Sales team gives inconsistent answers about what makes you different: ☐
- Losing deals for unclear reasons: ☐
- Customers can't explain what makes you different: ☐
- Large gap between current and desired perception: ☐
- Don't own a clear market position: ☐
- Competitors could publish your content: ☐
- No distinct POV in your category: ☐

#### Yellow flags (each counts as -1 point):

- Somewhat clear differentiation: ☐
- Moderate perception gap: ☐
- Messaging is somewhat consistent: ☐
- Content sometimes has a distinct POV: ☐

**Total Strategy Score:** \_\_\_\_\_

#### Interpretation:

- **0 to -2:** Your strategy is mostly sound. You might need better execution or a refresh.
- **-3 to -5:** Your strategy has gaps. Consider repositioning work.
- **-6 or lower:** You need strategic repositioning before any creative work.

### Brand Expression Health

Questions from Section 6 about visual identity and consistency.

#### Red flags (each counts as -2 points):

- Brand is 10+ years old and looks dated: ☐
- No brand guidelines or nobody uses them: ☐
- Multiple logo variations in use: ☐
- Can't tell your site from competitors without logos: ☐
- Using common category colors: ☐
- Inconsistent visual identity across channels: ☐
- ☐

#### Yellow flags (each counts as -1 point):

- Brand is 5-10 years old: ☐
- Guidelines exist but aren't always followed: ☐
- Visual identity is somewhat distinctive: ☐

**Total Expression Score:** \_\_\_\_\_





**Interpretation:**

- **0 to -2:** Your visual identity is working. Maybe needs minor updates.
- **-3 to -4:** Consider a brand refresh to modernize and improve consistency.
- **-5 or lower:** You likely need a rebrand.

**Business Performance Health**

Questions from Section 1 about metrics.

**Red flags (each counts as -2 points):**

- CAC increasing: ☐
- Sales cycle lengthening: ☐
- Win rate declining: ☐
- Deal size declining: ☐
- LTV declining: ☐
- NPS declining: ☐
- Market share declining: ☐

**Yellow flags (each counts as -1 point):**

- Any metric is stagnant: ☐

**Total Performance Score:** \_\_\_\_\_

**Interpretation:**

- **0 to -2:** Business is healthy. Brand issues are likely minor.
- **-3 to -5:** Business performance suggests brand isn't pulling its weight.
- **-6 or lower:** Brand problems are hurting business results. This is urgent.

**What You Need: Decision Matrix**

Based on your scores, here's what you likely need:

**If Your Strategy Score is Good (-2 or better)**

**AND Expression Score is Poor (-5 or lower):** → You need a **brand refresh or rebrand**

- Your positioning is sound
- You need better visual execution
- Focus on creative work

**If Your Strategy Score is Poor (-6 or lower)**

**Regardless of Expression Score:** → You need **repositioning first**

- Fix strategy before creative
- May need rebrand after repositioning
- Don't start with the logo

**If Your Performance Score is Poor (-6 or lower)**

**AND Strategy Score is Poor:** → You need **urgent repositioning**

- Brand issues are hurting business
- This should be a leadership priority
- Consider external help

**If All Scores Are Moderate (-3 to -5 range)**

→ You need **focused improvements**

- Identify the 2-3 biggest gaps



- Fix those before doing everything
- May not need a full rebrand

#### **If All Scores Are Good (-2 or better)**

→ You need **optimization, not overhaul**

- Improve execution and consistency
- Invest in brand building over time
- Don't rebrand just because you're bored

### **Next Steps**

Based on your assessment:

#### **If you need repositioning:**

1. Conduct customer research to understand perception gaps
2. Analyze competitive positioning in detail
3. Develop a clear positioning strategy
4. Test it with customers before rolling out
5. Then consider creative expression

#### **If you need a rebrand:**

1. Document your existing brand equity (what to keep)
2. Get leadership alignment on strategy first
3. Find an agency that understands strategy, not just design
4. Plan 3-6 months for the work
5. Build a comprehensive rollout plan

#### **If you need a refresh:**

1. Audit all brand touchpoints for consistency
2. Update guidelines if needed
3. Modernize visual elements while keeping equity
4. Train team on proper usage
5. Can often be done in 6-8 weeks

### **Need Help?**

Mighty Roar works with companies to figure out what their brand actually needs. We start with strategy, ask the hard questions, and help build brands that drive measurable business results.

Ready to talk? Visit [mightyroar.com](https://mightyroar.com) or email [newbiz@mightyroar.com](mailto:newbiz@mightyroar.com)

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#### **Tips for Using This Template:**

- **Be honest.** Lying to yourself wastes time and money.
- **Get input.** Don't fill this out alone. Talk to sales, customer success, and actual customers.
- **Focus on gaps, not perfection.** Every brand has weaknesses. The question is which ones are holding you back.
- **Connect to business impact.** Brand problems that hurt revenue get fixed. Brand problems that are just aesthetic don't.
- **Don't rebrand just because you're bored.** Wanting something new isn't a strategy.
- **Give it time.** This assessment should take at least an hour. Rushing it gives you bad data.
- **Review annually.** Markets change. Companies change. What you need this year might be different next year.