High-Level Brand Evaluation Worksheet
to Focus Your Marketing Efforts

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Read each sub-category question and assign a score.

Add up all sub-category scores to arrive at a score for each category.

Based on your score, determine if this is a challenge area, a growth area, or a strength to be further leveraged.

Category	Sub-Category	Sub-Category Question	Sub-Category Score	Category Score	Category Assessment
Product/Experience Quality	**Price**	Do you perceive your organization's services / product(s) to be (1) more expensive for users to purchase than competitors, (2) about parity with competitors, or (3) less expensive than competitors?			
	Patient or Customer Satisfaction	Do you perceive your organization's patient or customer satisfaction to be (1) worse than, (2) similar to, or (3) better than your key competitors?			***Circle Your Assessment***
	Unique Offering(s)	Does your organization have one or more product or service offerings / experiences / approaches that sets you apart / are notably distinct from your key competitors? *How to score:* *No (1), one or more offerings are slightly unique (2), or one or more offerings are **very** unique (3)*			Category Score of 4 to 6 **= Challenge Area** Category Score of 7 to 9 **= Growth Area**
	Awareness of Unique Offerings	How much are your organization's unique offering(s) associated with your brand by the organization's key target audience(s)? *How to score:* *We don't have a unique offering and / or it's not associated with the brand (1), key audience is somewhat aware / somewhat associates it with the brand (2), or key audience is highly aware / strongly associates it with the brand (3)*			Category Score of 10 to 12 **= Strength**

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Category	Sub-Category	Sub-Category Question	Sub-Category Score	Category Score	Category Assessment
Select-ability	**Market Share**	Does your organization lag behind its key competitors in market share (1), hold about the same market share as key competitors (2), or is it the market leader (3)?			
	Brand Awareness	Does your organization lag behind its key competitors in brand awareness (1), have about the same brand awareness as key competitors (2), or lead in brand awareness (3)?			***Circle Your Assessment*** Category Score of 4 to 6 **= Challenge Area** Category Score of 7 to 9 **= Growth Area** Category Score of 10 to 12 **= Strength**
	Readiness to Convert Leads	Is your organization operationally ready to turn leads into new volume in a timely manner? *How to score:* *No, many barriers (1), mixed readiness across products, service lines, geographies, etc. (2), or yes, largely ready (3)*			
	Online Presence	Is it easy for your target audience(s) to find you organziation online and convert? *How to score:* *No, many barriers/lag behind competition's online presence (1), mixed — some challenges with findability and conversion process (2), or yes, it is easy to find the organization and convert online (3)*			

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Marketing Resources	**Marketing Budget**	Is your marketing budget lower (1), about the same (2), or higher (3) than your key competitors?			***Circle Your Assessment*** Category Score of 3 to 5 = **Challenge Area** Category Score of 6 or 7 = **Growth Area** Category Score of 8 or 9 = **Strength**
	Marketing Team Size	Is your marketing team smaller (1), about the same size (2), or larger (3) than your key competitors? *If you work with agency partners, consider them an extension of your team.*			
	Marketing Tech Stack	How robust is your organization's marketing tech stack? *How to score:* *Dated / limited / not robust (1), allows for media and audience analysis but not integrated with sales / operations / finance; no data analyst on the marketing team (2), or robust marketing tools also integrated with sales / finance; data analyst(s) on marketing team (3). If you work with agency partners, consider them an extension of your team.*			

For more background, visit lewiscommunications.com

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Category	Sub-Category	Sub-Category Question	Sub-Category Score	Category Score	Category Assessment
Brand Positioning	**Brand Preference**	Is your organization less preferred by your target audience than its key competitors (1), preferred about the same (2), or the most preferred (3)?			***Circle Your Assessment*** Category Score of 3 to 5 = **Challenge Area** Category Score of 6 or 7 = **Growth Area** Category Score of 8 or 9 = **Strength**
	Target Audience(s)	How well does your marketing team understand your top-opportunity target audiences, including demographics, psychographics / motivators, and pain points? *How to score:* *Limited understanding that is informed by industry research not specific to our organization and marketing team discussions (1), some understanding informed by conversations with business strategy team and in-depth discussions with patients / customers (2), or in-depth understanding — informed not only by business strategy team analysis but addiitonal first-party data anylsis and primary research (3)*			
	Suite of Brand Positioning Assets	Think about your suite of brand positioning "assets" — your tagline, a distinct tone, distinct creative style, a mascot / icon, etc. — how distinct is it / difficult to confuse for a competitor? *How to score:* *Very little about our branding is distinct from competitors (1), it contains one distinct asset that is highly unique to my organization compared to key competitors (2), or it contains multiple distinct assets that are highly unique to my organization compared to key competitors (3).*			