Napier Marketing Group

INSIGHT • DIFFERENTIATION • GROWTH

THE

Brand & Marketing Brief Worksheet

A Discovery & Planning Tool for Furniture Retailers & Manufacturers — Updated for Today's Marketing Environment

INSIGHT • DIFFERENTIATION • GROWTH

PREPARED FOR: _____

A Napier Marketing Group (NMG) Planning Tool • Established 2009

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SECTION

The Brand & Marketing Brief

A roadmap to define your brand's strengths, weaknesses and opportunities — and the messaging that grows from them.

***NOTE:** This exercise should be completed every other year to ensure consistency and your Brand goals are met.*

GETTING STARTED

How to Use This Worksheet

- Answering these questions builds the skeleton for your Brand Platform and marketing/communications direction — the initial elements of your overall corporate strategy.
- We've included questions typical of a SWOT analysis. Only answer what's relevant to your business and add anything you believe is missing — space is provided throughout for extra ideas.
- Have every employee and stakeholder complete this exercise independently and keep individual responses anonymous and confidential — you'll get more honest, useful answers that way.
- Once everyone has responded, send the completed worksheets to NMG. Patterns across responses are often more revealing than any one answer — which is exactly what our review is built to find.
- All information gathered is confidential and used strictly for planning purposes.
- This edition adds sections on digital & social media, your website and e-commerce experience, marketing technology, the customer journey, budget, and decision-making — discovery areas that have become essential since this worksheet was first written.

READ THIS FIRST

How This Audit Must Be Conducted

- ***Every person in a senior role — the CEO, ownership, every VP and department head — must complete this worksheet independently.*** No exceptions, and no delegating it to "the brand person."
- No discussion before, during, or after***. Don't compare notes, don't align on a group answer, and don't let the most senior voice in the room set the tone for everyone else's.***
- The goal isn't consensus — it's the truth. This exercise is designed to surface how your brand is actually perceived internally, not the polished version leadership agrees to present.
- Expect gaps. It's common for the CEO's answers to look nothing like what the rest of the leadership team writes — and that gap is exactly the data you need.
- Those gaps become the foundation for your brand voice. You can't build an authentic, consistent voice on top of a leadership team that doesn't agree on who you are.
- ***Collect every response before anyone sees another's answers.*** Usually, these answers are sent to NMG for review and to deliver a final Brand Audit with recommendations — a clear picture of where your leadership team agrees, where it doesn't, and the specific brand voice, messaging, and positioning direction we recommend based on what surfaces.

If your leadership team already agrees on every answer before they've even opened this document, the exercise hasn't done its job.

PROJECT SUMMARY

Tell Us About the Project

- Please tell us, in your own words, about your company.
- What's the basic overview of the project(s)? What key initiatives need to happen to facilitate growth — new products, a brand platform refresh, a new store, etc.? Briefly note the key people involved.
- What is your primary goal or single most important purpose for this project?
- What are your secondary goals?
- What are your short-term goals (next 3–6 months)?
- What are your long-term goals (12+ months)?

Start with a short paragraph: general project information, your goals, and any background relevant to your marketing requirements.

AUDIENCE PROFILE

Who Are You Talking To?

- Who is your target audience? Profile a “typical buyer/user” in detail — occupation, age range, gender, how often they use your product, and their reading/media habits (trade or consumer publications, trade shows, entertainment preferences). Profile more than one buyer persona if you serve multiple segments, and include both business and individual/consumer profiles where relevant.

- What are the typical tasks your buyers perform with your key products? Briefly describe the products/services most critical to your overall goals and business model.

Who is the target? What do they care about? What do they do day to day where your products or services touch their experience?

How Products Are Currently Sold

Explain where your sales and leads come from today.

Sales Channel	Share of Sales
Online	_____ %
Trade shows / markets	_____ %
Sales calls	_____ %
Other	_____ %
Total	100 %

How Do You Want to Be Seen?

- What do you want your target audience to think and feel about your brand?
- Who — from a direct competitor standpoint — does a good job marketing and communicating their products, and why?
- Who else in your industry (not a direct competitor) markets well, and why?
- What adjectives describe how you want to be perceived? What adjectives describe how you're perceived today?
- What specific visual goals should your marketing and communications convey?
- What color(s) best describe your company culture today, and why?
- What color(s) would you like to describe your company culture going forward, and why?

What Sets You Apart

- How is your company different from your competition?
- What specifically sets your products or services apart from the competition?
- What parts of your current positioning, advertising, people, or website are already working well, and why?

Strengths

- Advantages of your proposition
- Current and future capabilities
- Competitive advantages
- Unique selling points (USPs)
- Resources, assets, and people
- Experience, knowledge, and data
- Marketing reach, distribution, and awareness
- Innovative aspects of your business
- Price, value, and quality
- Cultural, attitudinal, and behavioral strengths

Weaknesses

- Disadvantages of your proposition
- Gaps in capabilities
- Lack of competitive strength
- Reputation, presence, and reach
- Known vulnerabilities
- Effects on core activities and distractions

Opportunities

- Market developments
- Competitors' vulnerabilities
- Industry or lifestyle trends
- Technology, automation, and AI developments
- Global and economic influences
- New markets — vertical or horizontal
- Niche target markets
- Geographic expansion — export/import
- New unique selling points
- Tactical opportunities — surprise moves, major contracts, etc.
- Partnerships, agencies, and distribution
- Volume, production, and economies of scale
- Seasonal, weather, or fashion influences

Threats

- Competitor intentions
- Shifts in market demand
- New technologies, services, or ideas
- Vital contracts and partners at risk
- Ability to sustain internal capabilities
- Obstacles you're currently facing
- Potentially insurmountable weaknesses
- Economic conditions — at home and abroad
- Seasonality and weather effects

Targeted Message & Communication Strategy

- In a single word or phrase, what result do you expect once this project is complete? (Your “targeted message.”)
- What overall message are you trying to convey today — cost-effective, secure, reliable, efficient, etc.? Is it working, and why or why not?
- What’s the best way to convey that message to win customers — messaging and copy, creative positioning, a specific offer, a clearer path to purchase?

MODERNIZED

Measuring Success & KPIs

- % increase in inquiries or leads
- % increase in sales, and average ticket / order value
- Website traffic and conversion rate
- Email open rate, click-through rate, and list growth
- Social media engagement rate and follower growth
- Cost per lead and return on ad spend (ROAS)
- Online review volume, rating, and repeat-purchase rate

Be as specific as possible — numbers, not just direction, make this section useful.

SECTION

What’s New: Digital, Data & Customer Experience

The discovery areas that have become essential since this worksheet was first written

Digital & Social Media Presence

- Which social platforms are you active on today, and who owns posting on each?
- How often do you post, and what's your average engagement rate on each platform?
- Do you run paid social advertising? On which platforms, and what's the monthly budget?
- Are you working with influencers, creators, or user-generated content? What's worked?
- What does your online review profile look like — rating and volume on Google, Yelp, Houzz, or industry-specific sites?
- Who responds to reviews and social comments, and how quickly?
- Are you using short-form video (Reels, TikTok, Shorts)? If not, what's stopping you?

Website & E-Commerce Experience

- What platform is your website built on, and when was it last redesigned?
- What percentage of your traffic is mobile vs. desktop, and how's the mobile experience?
- Can customers browse pricing, financing, or availability online, or do they need to call or visit?
- Do you sell online directly? If so, what percentage of revenue comes through e-commerce?
- Do you offer live chat, chatbot, or AI-assisted shopping support?
- What's your investment in SEO and local SEO (Google Business Profile, local listings)?
- What analytics tools do you use, and who reviews the data — and how often?

Marketing Technology & Data

- What CRM or POS system do you use, and does it talk to your marketing tools?
- What email platform do you use, and how large and engaged is your list?
- Do you use marketing automation (abandoned-cart emails, birthday offers, post-purchase follow-up)?
- Can you track a customer from first ad click to final sale? If not, where does the trail go cold?
- How do you collect, store, and protect customer data — and are you meeting current privacy expectations?
- Is customer data used to personalize offers, or does everyone see the same message?

Customer Journey & Post-Purchase Experience

- What does delivery and installation look like from the customer’s point of view?
- Who follows up after the sale, and when — and what do they ask?
- Do you have a formal process for generating reviews and testimonials?
- Do you have a loyalty, referral, or repeat-customer program? How is it performing?
- What’s your warranty and service experience like, and who owns it?
- What percentage of your business comes from repeat or referred customers?

Budget & Investment

- What's your total annual marketing budget, and what percentage of revenue does it represent?
- How is that budget currently allocated across channels (digital, print, broadcast, events, etc.)?
- Do you have co-op or vendor/manufacturer funding available, and how much of it goes unused?
- Who manages your media buying and vendor relationships — in-house, an agency, or both?
- What's your appetite for testing new channels or tactics this year?
- What would you do with 20% more budget — and what would you cut with 20% less?

Decision-Making, Approval & Timeline

- Who gives final sign-off on creative, campaigns, and spend?
- How many people are typically involved in an approval, and how long does approval usually take?
- What's your ideal completion date for this project, and is it tied to a launch, season, or event?
- Are there seasonal windows we need to plan around (peak selling seasons, floor sets, promotions)?
- How often should we check in, and in what format — call, report, dashboard?
- Who else should be part of this process that hasn't been mentioned yet?

SECTION

Sales, Merchandising & Store Operations

Building the foundation for sales training, store standards, and measurable performance

How You Set & Track Goals

- Who sets sales goals for the store or department?
- What sales goals are set — volume, profit, closing ratio, etc.?
- When are sales goals set?
- Are budgets attached to sales or other goals?
- What time period(s) are measured?
- Who is measured — individually, collectively, or both?
- What furniture categories are measured?
- What else is measured against a goal?
- How often are goals reviewed?
- What type of charting or reporting is used?
- How are goals communicated to the team once set?

Staffing & Training — By the Numbers

- How many hours per month are devoted to formally training store staff?
- How often is training performed by store personnel, and what percent is formal vs. informal?
- How many hours per month are formal vs. informal?
- How often is training performed by factory/vendor representatives, and what percent is formal vs. informal?
- How often is training performed by guest speakers, and what percent is formal vs. informal?
- Is there a structured onboarding program for new sales associates?
- Is any training delivered digitally — video, e-learning, vendor portals?
- Who is responsible for training consistency across locations?
- How is training effectiveness measured — sales lift, close rate, mystery shop scores?

Training Topics — Mark & Rank

Company History	Company Culture	Procedures & Process	Product Knowledge	New Product Training
Competitive Product	Selling Techniques	Active Listening	Demonstration Skills	Problem Solving

For each topic: mark whether training is Formal (F), Informal (I), or Both (B) — then rank all ten from 1 (most covered) to 10 (least covered) in your formal training.

Merchandising Standards

- Are all items tagged individually?
- Are vignettes tagged as a group, collection, or as displayed?
- Is alternate package pricing available within a vignette?
- Are financing offers (dollars per month/week) displayed on signage?
- Are special, featured, or discounted items tagged the same as regular goods?
- Are alternative colors, fabrics, or finishes shown beyond a picture?
- Are best sellers made prominent on the floor, and identified as such?
- Are featured items made prominent on the floor, and identified as such?
- Are markdowns shown with “was/is” pricing on signage?
- Is the sale theme carried through the entire store?
- Are QR codes or digital signage used to show additional options or reviews in-store?
- Does signage reflect your current brand look, colors, and tone?

Display Condition & Care

- How often are vignettes changed or moved?
- Are displays fully operational — curios lit, lamps on, etc.?
- Are feature call-outs visible on product — hidden switches, hidden storage, etc.?
- Who inspects floor display condition, and how often?
- Who cares for displays during open hours?
- Are displays styled to photograph well for social media and online listings?
- Is there a documented merchandising standard staff can reference?

The Post-Sale Experience

- Are your terms & conditions displayed, and explained to every customer?
- Who helps the customer complete financing paperwork, and how long does approval typically take?
- Once a customer decides to buy, how long does it take to complete the sale paperwork?
- Who contacts the customer after the sale if there are questions or problems?
- Is customer satisfaction measured after delivery — survey, call, or review request?
- How are complaints escalated, and who owns resolution?

LAST STEP

Additional Notes & Next Steps

- What haven’t we asked that you think we should know?
- What’s your ideal target date for completing this project?
- What does success look like to you, in one sentence?
- Once every senior leader has responded independently, send the completed worksheets to NMG. We’ll tabulate and review every answer and deliver a final Brand Audit with recommendations.

Thank you for taking the time to work through this. The more candid the answers, the sharper the strategy we build together.

Thank You

Questions? Reach out any time.

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Bill has worked in the home furnishings industry for over 12 years, as Chief Marketing Officer for some of the industry's largest manufacturers, and has led some of the largest retail promotions ever launched in the category — integrating traditional marketing with web and social strategy across B2B and B2C.

Ask us for a completed example — one client saw a 40% increase in sales in the first 9 months after this process.