**BRAND STRATEGY ANNUAL REVIEW TEMPLATE**

BRAND

STRATEGY

ANNUAL REVIEW

Brand Name

BRAND MANAGER NAME

BRAND MANAGER

00/00/0000

Table of Contents

[BRAND PERFORMANCE SUMMARY 3](#_Toc96206852)

[COMPETITOR ANALYSIS 4](#_Toc96206853)

[SOCIAL MEDIA ANALYSIS 5](#_Toc96206854)

[Social Media Analysis + Recommendation Summary 6](#_Toc96206855)

[COMMUNICATION STRATEGY 7](#_Toc96206856)

[SWOT Analysis 7](#_Toc96206857)

[SWOT Analysis Summary 8](#_Toc96206858)

[Identify SMART Objectives + Metrics 9](#_Toc96206859)

[Competitor Communication Analysis 10](#_Toc96206860)

[BRAND PERCEPTION ANALYSIS 11](#_Toc96206861)

[Brand Perception Summary + Recommendations 11](#_Toc96206862)

[Brand Survey Aggregate Results 12](#_Toc96206863)

[FINAL RECOMMENDATIONS 13](#_Toc96206864)

# A picture containing text, accessory, umbrella, stationary  Description automatically generatedBRAND PERFORMANCE SUMMARY

Summarize the brand’s performance over the past year.

Include a broad overview of the goals you’ve reached and haven’t reached during the previous year.

|  |
| --- |
|  |

# A picture containing text, accessory, stationary, envelope  Description automatically generatedCOMPETITOR ANALYSIS

List your current competitors and describe the current year’s market environment.

Analyze how these two factors have shifted during the past year.

Provide recommendations for how the brand will respond to changes in the competitive landscape.

CURRENT YEAR

ANALYSIS

RECOMMENDATIONS

|  |  |  |
| --- | --- | --- |
|  |   |  |

# Chart  Description automatically generatedSOCIAL MEDIA ANALYSIS

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | CURRENT NUMBER OF FOLLOWERS | FOLLOWER LAST YEAR GOAL | FOLLOWER NEXT YEAR GOAL | MONTHLY REFERRAL TRAFFIC | % OF CHANGE LAST YEAR | % OF CHANGE LAST MONTH | CLICKS PER POST LAST YEAR | CLICKS PER POST GOAL |
| FACEBOOK |   |   |   |   |   |   |   |   |
| INSTAGRAM |   |   |   |   |   |   |   |   |
| TWITTER |   |   |   |   |   |   |   |   |
| LINKEDIN |   |   |   |   |   |   |   |   |
| TikTok |   |   |   |   |   |   |   |   |
| SNAPCHAT |   |   |   |   |   |   |   |   |
| PINTEREST |   |   |   |   |   |   |   |   |
| TUMBLR |   |   |   |   |   |   |   |   |
| YOUTUBE |   |   |   |   |   |   |   |   |
| OTHER |   |   |   |   |   |   |   |   |
| OTHER |   |   |   |   |   |   |   |   |

## A picture containing text, accessory, umbrella, stationary  Description automatically generatedSocial Media Analysis + Recommendation Summary

|  |
| --- |
|  |

#

# A picture containing text, accessory, umbrella  Description automatically generatedCOMMUNICATION STRATEGY

#

Conduct a SWOT analysis of your current communication strategy.

Set new SMART objectives and metrics.

## SWOT Analysis

Analyze how you are currently communicating with your target audience.

|  |
| --- |
| INTERNAL FACTORS |
| STRENGTHS + | WEAKNESSES – |
|  |  |
|  |  |
| EXTERNAL FACTORS |
| OPPORTUNITIES + | THREATS – |
|  |  |

#

## A picture containing text, yellow  Description automatically generatedSWOT Analysis Summary

|  |
| --- |
|  |

## A picture containing text, outdoor object  Description automatically generatedIdentify SMART Objectives + Metrics

**S**pecific, **M**easurable, **A**chievable, **R**ealistic, and **T**imely

|  |
| --- |
|  |

## Competitor Communication Analysis

How are your competitors communicating with their audience?

What is working? What is not working?

What needs to change in the year ahead?

|  |
| --- |
|  |

# A picture containing accessory, stationary, envelope  Description automatically generatedBRAND PERCEPTION ANALYSIS

Conduct the brand perception survey with a broad segment of your target audience.

Collate the aggregate data. Use the survey form (below) to indicate the number of responses

in each category. Summarize the findings and provide recommendations for the year ahead.

## Brand Perception Summary + Recommendations

|  |
| --- |
|  |

## Brand Survey Aggregate Results

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1. | How familiar are you with our brand? | NOTAT ALL | A LITTLE | SOMEWHAT | FAMILIAR | VERY FAMILIAR |
|   |  |  |  |  |  |
|   |   |   |   |   |   |   |   |   |   |   |   |   |
| 2. | How likely are you to recommend us to friends or family? | Scale of 1 to 10 |   | 3. | How did you find out about us?  | Family or Friend |  |
|   |  |   |   | Online Search |  |
|   |   |   |   |   |   |   |   |   | Magazine, Blog, or Other Media |  |
| 4. | What level of trust do you have in our brand?  | Scale of 1 to 10 |   |   |   |   | Social Media |  |
|   |  |   |   | OtherPlease specify |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 5. | Which words best describe our brand?  |  |  |  |  |
|   | Innovative |  | Playful |  | Rebellious |  | Authoritative |  |
|   | Unique |  | Refined |  | Unconventional |  | Classic |  |
|   | Casual |  | Elite |   | Friendly |  |  |  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 6. | In the time since you first became aware of us, has your perception of our brand changed? | YES |  |  7. | What brand comes to mind when you think of (product name)?  |  |
|   | NO |  |   |

# **A picture containing outdoor object, sport kite, colorful, envelope  Description automatically generated**FINAL RECOMMENDATIONS

Based on your analysis, provide overall recommendations for next year’s strategic direction.

Include recommendations for changes to the brand style guide and the brand communication pillars.

Attach supporting documents or expand this section to include more detailed recommendations.

|  |
| --- |
|  |

|  |
| --- |
| **DISCLAIMER**Any articles, templates, or information provided by Smartsheet on the website are for reference only. While we strive to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the website or the information, articles, templates, or related graphics contained on the website. Any reliance you place on such information is therefore strictly at your own risk. |