Brand Planning
B70.2365
Spring 2005

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Class Times:   Tuesday and Thursdays 10:30a-11:50a
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This course is based on the teachings and writings of Professor David Aaker, considered the father of modern branding. Brand planners/strategists face many challenges, including how to:

1. Create a comprehensive brand architecture that will provide strategic direction,
2. Generate motivating brand identities and value propositions for the key brands,
3. Develop brand-building programs, and
4. Organize to manage brands effectively.

The goal of this course is to provide concepts, models, methods, and role models that will help address these challenges.

The brand architecture challenge involves an identification of the brands and the subbrands that are to be involved, their respective roles, and, most important, how they
relate to each other. An effective, well-conceived brand architecture will lead to clarity in customer offerings and realize real synergies in the brands and their communication programs. What is destructive and wasteful is to have a host of brands that emerge and drift in a random, disorganized fashion resulting in a confused set of offerings with monumental communication inefficiencies. A key issue in the creation of effective brand architecture is knowing when to stretch an existing brand, when to employ a new brand, when to use subbrands, and when to use endorsed brands. The roles and management of subbrands and endorsed brands are often the key elements of brand architecture decisions. Can a subbrand or endorsed brand be used to help a brand stretch over products and markets?

The brand identity challenge is to have a vision of how each actively-managed brand should be perceived by its target audience. The brand identity helps to provide clarity of mission for employees and partners and clarity of offering to customers. It needs to resonate with customers, differentiate from competitors, and reflect the organization’s resources and plans.

Development of communication and other brand-building programs needed to realize the brand identity is the third challenge. Brand-building programs not only implement the brand identity, but also define it. An advertising execution or sponsorship can bring clarity and focus to a brand identity that appears sterile and ambiguous. In fact, some strategies are difficult to communicate in words without some pilot executional elements. In addition, some executional effort may provide confidence that a strategy is doable.

The fourth challenge is organizational. Brand strategies need to be created and implemented in the context of organizational structures and processes. This course will consider various forms of organizational efforts to support brand building. Global brand management creates complexities that put strains on the organization, and these strains will also be addressed.

Case Analyses

A large part of the course will involve discussions of cases, cassettes, and exercises. This part of the course, which will include short written assignments and class discussions, will constitute about 60% of the grade. Name cards will be used throughout the semester. Please try to maintain the same seat throughout. There are written assignments for many classes. You should plan to turn in from five to eight of them at the beginning of the week (Tues. class). They will not be returned. They will, however, be graded and contribute to the class participation grade. The written assignments may be done with no more than one partner.

The Brand Strategy Project

A brand strategy project is to be undertaken by a team of four to six people for a client with a new or existing brand. The project will count for about 40% of the grade.
The project should involve some interviews or workshops with people in the client firm. Either pick a client that has one or more people who are willing to spend a few hours with you or, if that is not possible, plan to role play client managers yourself. If you are role playing, you will need to have some knowledge of (or make assumptions about) the future business strategy.

You should pick a context in which there is some brand architecture issue. It could involve a brand extension with a new brand vs. endorsed brand vs. subbrand decision. Or it might involve the role of the corporate brand. It could also involve a branded feature or service, including issues such as how much should be spent on the brand, what role will it play, and what its link to the parent brand should be.

Report Outline
The following provides an outline of the report:

1. A brand audit as outlined in the appendix. You should consider including
   a. Brand inventory.
   b. Description of the current brand image and communication strategy—If customer research is not feasible, the opinions of managers could be used.
   c. Competitor brand analysis.
   d. Brand portfolio roles—What are the silver bullet brands, the strategic brands?
   e. Brand system evaluation.

2. A brand identity and value proposition recommendation for one or more of the major brands. Specify if this identity is to be modified for different products or segments. For each brand identity specify:
   a. The core identity
   b. The brand essence/tagline
   c. Strategic imperatives
   d. Role models—internal or external
   e. A measurement instrument

This phase should involve an assessment of the customers, competitors, and the brand itself. In the customer research, it might be appropriate to do some qualitative research to get at the brand’s perceived heritage, unique attributes, brand personality, organizational associations, symbols, functional benefits, emotional benefits, and self-expressive benefits. The same information should be obtained about the major competitors—sometimes this can be implied from ads, supplemented by secondary research. The brand goals of your client brand and competitors in part can come from reviewing their annual reports and current advertising.

3. Develop recommendations for a communication program for the brand. You can develop logos, packages, and ads, if you wish. However, you can also provide broad
suggestions as to the elements of the communication program and not provide any creative work. What events might be sponsored? What promotions? What co-branding efforts? What visual images? What metaphors? What can be done to build/reinforce awareness, perceived quality, brand loyalty, and associations?

4. Develop a brand architecture that specifies the key brands and the relationship between them. Specify the use of endorsed brands, subbrands, branded features/components, co-brands, etc. Identify the key brand architecture issues and defend your recommendations with respect to those issues.

5. Find a “best practice” brand strategy that could provide insights and guidance to your brand strategy. It might be a brand from a competing firm or from another industry. These benchmarking brands should be looked at critically—why might the strategy work in that context but not in ours? What is different?

6. Optional: If appropriate, develop a new brand name for a brand, a subbrand, a branded feature or whatever.

**Developing a Brand Strategy**

When you are developing a brand strategy for one or more brands, do not attempt to apply every brand concept that you know. Draw on those that are really relevant and helpful. There is no checklist here. Focus your efforts on the most important brands and branding issues.

**Report Schedule**

Hand in by **October 10** a note outlining:

1. The group members
2. The client selected
3. The brands to be focused on

Hand in by **November 14** a memo with a draft of the brand audit (it can be incomplete) and an identification of the major brand strategy issues.

Hand in by **November 26** a first draft of the brand identity and value proposition paper and the brand architecture section. Both can be incomplete. It does not have to be a final draft.

Final group report is due **December 10**.

**Texts:**


Course Outline:

(Cases and cassettes are in the case reader unless noted otherwise.)

<table>
<thead>
<tr>
<th>Date and Topic</th>
<th>Reading Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1. 9/5, Brand Equity</td>
<td>MBE Ch. 1-7 BAM Introduction</td>
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</tbody>
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What is a brand?
Why build brands? Why is it hard?
What is a strong brand? What examples can you nominate?
What is brand equity?

Awareness--
How do you create awareness if you are Volvo?
Who has done it well? How?

**Cassette:** Datsun/Nissan (MBE Chapter 3)
What was the logic? Was it a mistake?

Perceived quality--
What are quality cues for:
- Cat Food
- Golf clubs
- Cosmetics
Why is Tiffany perceived as having high quality year after year?

**Cassette:** The Schlitz Story (MBE Chapter 4)
1. Why did Schlitz lose their perceived quality?
2. What was done to get it back? Why did those efforts fail? What would you have done?
3. Do you know of any brands that did recover from a perception of low quality? Consider, for example, Toyota, which started with a very bad quality reputation.
Brand loyalty--

How would you estimate the value of the loyal customer if you were a bank? A car brand?
Who has a good loyalty program in banking? airlines? computers?

**Week 2. 9/10, 9/12  The Brand Identity**  

BSB Ch. 1-6  
BAM Ch. 1-2

Strategic analysis for the Stern School--
Customer, competitor, self

Building brand identities--

What should the brand identity be for the Stern School?

_Cassette:_ The Y&R Brand Asset Valuator (BSB Chapter 10)

1. What in your view are the strongest brands in the U.S.? Why?
2. Explain and evaluate the model. Does differentiation come first, as the model predicts? Can you think of counterexamples?
3. Examine Figure 10-1. Given that evidence and the underlying model, what would you say are the strongest brands in the U.S.?

_Cassette:_ Luxury Sport Automobile Group

1. For each of the brands—Jaguar, Mercedes, BMW, Lexus
   a. What is the brand personality?
   b. What is the emotional benefit?
   c. What is the self-expressive benefit?
2. Rank the symbols in terms of their ability to add to the brand equity.
3. Evaluate the advertising of each.
4. Why do people buy luxury cars? How does the market segment?

_Cassette:_ Harley Davidson (BSB Chapter 5)

1. Develop a brand identity. What is the core identity? The brand essence?
2. What, in your view, is the brand personality of Harley? How did it develop? How is it maintained?
3. How do you account for the Harley user’s involvement in the brand? The summer gatherings? The local H.O.G. chapters? The tattoos? How is this intense loyalty and involvement different from that found among Saturn owners?

_Cassette:_ L.L. Bean

Develop a brand identity. What is the core identity? The brand essence?

**Written assignment:** Write up a brand identity for L.L. Bean or for Harley.

**Week 3. 9/17, 9/19  Brand-Person Relationships--Market Research**  

MBE Ch. 6  
BAM Ch. 3-4
Case: Exploring Brand-Person Relationships: Three Life Histories

1. Think about the life stories of our three informants and the quotes regarding the brand they use.
   a. Is it appropriate to say that these consumers have formed relationships with the brands they know and use? In what ways yes, in what ways no?
   b. What kinds of connections form between consumers and their closely-held brands?
   c. Are these connections specific to individual brands, or can patterns be identified across brands in a given consumer portfolio?
   d. Are Jean’s brand relationships different from Karen’s or Vicki’s? Whose brand relationships are strongest? Why?

2. Think about the pool of brand relationships available for study in the case.
   a. Can you think of ways to summarize and describe these relationships in ways that might be managerially useful?
   b. Which brand relationships in the case would you describe as especially strong and enduring? What makes you describe these as “strong”? If you wanted to measure the strength or quality of a brand relationship, what questions would you ask the consumer?
   c. Why do some relationship decline and dissolve which others intensify and endure?
   d. If you had to predict three consumer-brand relationships that would endure five years after these initial interviews, which would you select? Why those?

3. Think about the traditional ideas of brand loyalty, customer satisfaction, and brand equity. Have the stories of Jean, Karen, and Vicki disturbed your sense of the meaning of these terms in any way?

Written assignment: Comment on one of the three questions.

Week 4. 9/24, 9/26 Naming

Naming Exercise:
Form a project team ideally of four to seven people. Your project team has been assigned to analyze and make naming recommendations for a new product. Prepare a brief note with several candidate name choices and be prepared to explain their rationale.

Your client is a national gas pipeline company with revenues of $4 billion. Some 15 years ago, your company entered the telecommunications business by feeding fiberoptic cable through decommissioned pipelines. This led to involvement in various multimedia technology businesses through the "Vyvx" subsidiary, which transmits video signals across the US and internationally. Vyvx activities include providing 80% of the video feed of MLB (major league baseball), NBA, NHL, and NFL games.
Vyvx has developed a "smart screen" technology that can interact with and deliver information to visitors to a variety of sports and other group-activity venues. The "smart screen" is inset into individual seat backs. At sports venues, the smart-screen technology will allow visitors to get statistics, see instant replays from self-selected angles, and order food, merchandise, and tickets to future events. Other implementations could be in sports bars, movie theaters, concert or opera halls, etc. Develop a name for this product/service. **Written assignment:** Generate a name for the naming exercise.

**Week 5. 10/1, 10/3  Brand Identity Elaboration, Quantifying Brand Equity**

**BSB Ch. 7, 10**  
**MBE Ch. 1 p. 21-30**

*Cassette:* Elaborate the Harley Brand Identity—
Identify external role models for the brand.
Probe the boundaries of one of the categories of external role models.

*Case:* Brand Valuation Methodology
1. Why would you attempt to put a value on a brand?
2. Evaluate the methodology. Suggest improvements.

*Cassette:* The Levi’s Tailored Classics Story (MBE Chapter 9)
1. Why, in your view, did the Levi’s Tailored Classics concept fail?
2. Was the concept faulty? Would you have gone after a different segment? Used a different position? Used a different name (not connected to Levi’s)?

**Written assignment:** Either provide a one-page note with an external role model set for Harley or evaluate the methodology in the brand valuation case.

**Week 6. 10/8, 10/10  Brand Architecture--Extensions--Personal Care Products**

**MBE Ch. 9**  
**BSB Ch. 8, 9**  
**BAM Ch. 6**

*Cassette:* Gillette  (Pay particular attention to question 2)
1. What was the Gillette brand image in 1965 before Gillette Foamy? What is it now? What is its personality?
2. Evaluate Gillette’s decisions to:
   a. Introduce a disposable razor under the Gillette name
   b. Introduce the Sensor for Women under the Gillette name rather than a new brand name
   c. Introduce an advanced disposable razor under the Gillette CustomPlus name rather than using Good News
d. Introduce the Gillette Satin Care for Women instead of creating a new brand name such as SatinCare without a Gillette endorsement

e. Introduce the Gillette Series line rather than using the Right Guard brand

3. Evaluate the packaging for the Gillette Series line and for the Gillette Sensor Excel for women. What are the criteria for a good package?

4. Gillette wanted to attack Barbasol, a low-end entry in the shaving cream market. What is your opinion of using Good News Shaving Cream by Gillette as a brand for this objective? Would it cannibalize from Right Guard?

5. What is the logic of the brands in the oral care industry becoming category brands? Was it wise decision for Oral-B to follow? What is the role of branded features at Oral-B?

Cassette: Ralph Lauren Case  
1. For each Ralph Lauren brand identify the master brand, endorser brand, subbrand.
2. Evaluate the brand architecture. What are the strong points? The weak points?
3. Evaluate the RL symbol. What is the logic?

Brand Relationship Spectrum  
Identify an example of each of the nine elements of the spectrum. Evaluate whether it was a good branding decision or not.

Cassette: The Healthy Choice Story (BSB Chapter 9)  
1. What is the brand identity of Healthy Choice? The core identity?
2. Has it been extended too widely? On what product would you say no? On non-food items?
3. Compare the brand policy of Healthy Choice with that of Kingsford Charcoal (BSB Chapter 9).
4. Compare Healthy Choice to Weight Watchers. (See MBE Chapter 5 for the Weight Watcher’s Story.) Is there any difference in their brand identities? Why wasn’t Weight Watchers the first to introduce a “Healthy Choice” brand? Why was it ConAgra?

Written Assignment: Report your work on the brand relationship spectrum example.

Week 7. 10/15, 10/17 - Branding in the High Tech World  
BAM Ch. 5  

Case: Intel  
Issues in High Tech Branding--  
What are some strong high tech brands? How did they become strong?  
Identify some (good)(bad) examples of brand architecture in high tech.
Observe the HP “home” brand (with the packaging with orange balloons). What is your opinion of it?
Is branding in high tech different than in other contexts?
**Written assignment:** Conduct qualitative market research using ideas discussed in chapter 6 in MBE assuming that your client is the Microsoft. Conduct a minimum of three one-on-one interviews. If you work with another person, generate five interviews. Alternatively you can do one focus group. Ask, If Microsoft were a person, what would be its personality? age? gender? etc. Or, if it were an animal, what kind would it be? What kind of magazine? movie? sports celebrity? movie star? etc. Do the same for HP and Intel.

**Week 8. 10/22, 10/24**

**The Web**

Branding on the Internet--
- Explore the following sites:
  - Amazon, Ebay, Abercrombie & Fitch, Gap
  - Americangirl, Red Envelope, ESPN, AskJeeves
  - Tide, Audi

Evaluate the above web sites for:
1. The name and/or symbol
2. Look and feel—personality
3. Content
4. Experience
5. Use of branded benefits, features

What is a good brand-building web site? Do you have any other examples?

**Written assignment:** Write up your analysis of two of the above sites from the Branding on the Internet assignment.

**Week 9. 10/29, 10/31**

**Branding and Culture**

**Case:** Virgin Atlantic Airways: Ten Years After
1. How was the VAA brand built? What are the critical factors contributing to VAA’s brand strength?
2. Develop a brand identity statement for VAA.
3. Would you extend a record firm into airlines or use another name? What about taking the Virgin name into colas? What are the pros and cons?
4. What is the image of:
   1. Southwest
   2. Singapore
   3. British Airways
   and on what is that image based?
**Written assignment:** Write a comment on the Virgin case—you don’t have to write up all the questions.

**Cassette:** The Saturn Story (Chapter 2 of BSB)
1. What did Saturn do differently?
2. What elements of the Saturn brand-building effort would you classify as critical (if it were missing Saturn would not have pulled it off)? What was the single most important Saturn decision?
3. Should GM have given Saturn an Accord-class car earlier? Why? What do you think about a Saturn compact designed by Opel and made in a closed GM plant outside Philadelphia?

**Week 10. 11/5, 11/7  Brand Building in Packaged Goods**

**Case:** L’Oreal
1. Customer analysis: What are the motivations? How would you segment the market?
2. Competitor analysis: How are the major competitors positioned?
3. Develop a brand identity for L’Oreal.
4. Develop a brand identity for Plenitude. Which is the driver brand?
5. What was the strategy in France? Will that work in the U.S.?
6. Address these issues:
   - The number of products
   - The star system
   - Too French?
   - Aging position?

**Cassette:** Asahi
1. Why was Kirin such a dominant brand for so long?
2. How did Asahi break Kirin’s lock on the market?
3. Why did Kirin not come up with dry beer and preempt Asahi?
4. What branding strategy would you employ now if you were Kirin?

**Written assignment:** Write a comment on one of the two cases—you don’t have to write up all the questions.

**Week 11. 11/12, 11/14  Moving a Brand Up and Down**

**Case:** Transition
1. What is the current brand identity of Transition?
2. What are the threats and problems facing Transition?
3. What are your recommendations as to future strategy?

**Cassette:** Kodak (BSB Chapter 1)
1. What is the Kodak image?
2. Kodak is going digital. Is its image a liability? If so, how can it be overcome? What role will the brand Kodak Digital Science play?
3. Evaluate Kodak’s Funtime as a fighter brand to stave off the price brands like Konica and Polaroid and the private label brands. What would you do to combat this threat?

Cassette: GE vs. Marriott
Evaluate their branding strategy. Would you make any changes? What is the most marginal branding decision in your view?

Written assignment: Comment on one of the three above cases.

Week 12. 11/19, 11/21 Naming and Design MBE Ch. 8

Case: Energia General
1. What is the strongest brand of all the brands in this market? Why?
2. What are the associations of the visuals of the brands YPF, Shell, Esso, Isaura, Astra, and Puma?
3. What criteria would you use in selecting a name and design? What name would you select? How would you convince the original firms to accept the new name?

Cassette: GE (BSB Chapter 7)
1. What was the image of GE in the 1950s?
2. In the 60s and beyond, would you have put the GE name on GE Jet Engines? On GE Capital? On GE Medical Systems? What does the GE brand give to those businesses? What about GE Kidder, Peabody & Co? Or GE NBC? What criteria would you use to put the GE name and logo on a brand?
3. Evaluate the logo developed in 1985 that has the monogram (to reflect the heritage), the GE plus a descriptor name in a bold Univers type (suggesting forward movement), a laser line (suggesting high technology), and an asymmetrical layout (conveying movement with its visual tension).
4. What does GE mean now?

Week 13. 11/26 Building Brands—Beyond Advertising

Case: Haagen-Dazs Ice Cream in Europe: The Farggi Challenge
1. Evaluate the marketing strategy and plan of Haagen-Dazs and the plan of Farggi Tubs & Ice-Cream.
2. In terms of building a strong brand, which of the two competitors is doing the better job? What are the strengths and weaknesses of the two marketing plans with respect to building of the brand?
3. What should Margarita recommend as a future direction of growth? What other marketing decisions would Margarita need to make to improve the competitive
position vis-à-vis Haagen-Dazs in the Spanish market? What would be your priorities?
4. Evaluate the economics of the decision.

**Cassette:** Adidas
1. Evaluate Adidas’ approach to brand building. What do you like and dislike about it?
2. Should Levi’s use a similar strategy? What about Seven-Up? What types of brands could best use the Adidas strategy?

**Written assignment:** Develop some examples of brand building that do not rely on advertising.

**Week 14. 12/3. 12/5 Building Brands Globally**

**Case:** Heineken
1. What is Heineken’s brand identity?
2. Is Heineken a global brand? Should it be?
3. What elements should be global? Be specific.
4. How would you organize to manage the Heineken brand?

**Cassette:** McDonald’s in Europe
1. Should the best ads be exported to other countries?
2. Should this effort be extended to all of Europe? If so, how?
3. Should this be extended to multiple agencies? How?

**Week 15. 12/10 Recap of Projects and Course**

Final group report due
The Brand Strategy Audit

The process starts with a brand strategy audit that provides a systematic way to inventory current brand assets and strategy. The audit will allow problems to be identified and priorities to be set with respect to brand strategy development and implementation. There are five elements of the audit. The first identifies the brands and subbrands. The second identifies the current image and strategy of each brand. The third analyzes the competitors. The fourth categorizes the brands as to their roles. And the fifth evaluates the brand system.

Brand Inventory
1. What are the organization’s brands?
2. For each brand, what are the subbrands?
3. For each brand, what are the branded features, services, or components?

Brand Image and Strategy
For each brand:
1. What is the brand image? Its perceived quality? Its brand personality?
2. What is the awareness level?
3. What is the brand’s point of differentiation? Its current value proposition?
4. What is the brand’s heritage?
5. Develop a profile of the brand’s brand-building activities. What is its heritage? What advertising themes have been placed behind the brand?

Competitors
1. Who are the major competitors or competitor types?
2. What are their strengths? How are they perceived? How is each positioned? Are they attempting to change perceptions? If appropriate, ads for competitors should be obtained and analyzed as to positioning strategies and quality and consistency of execution.

Brand Categorization
1. What brands or subbrands are “strategic brands”—brands that deliver or are expected to deliver significant sales and profits to the firm or are important points of leverage for the organization (e.g., Hilton Rewards)?
2. What brands or subbrands are silver bullets—brands or subbrands that influence another brand? Are they being exploited properly? Are additional silver bullets needed?
3. What brands are playing endorser roles? In what ways do they add value? Is their identity appropriate for that role? Is any identity-building augmentation needed because a brand is playing an endorser role at times? Are there cases in which the
endorser should recede or even become disassociated? Are there other contexts in which an endorser should be added or made more pronounced?

4. Identify umbrella or range brands—brands that range over product classes. Does the brand identity work in each context? Is there a plan that specifies what products the umbrella brands will include in the future?

**Brand System Evaluation**

1. Evaluate the number of brands. Are there too many? Are brands stretched too far? Should new brands be considered? What services, features or ingredients should be branded?

2. Are some brands not leveraged enough? Could they do more? Could they be used to attack new product markets? Could they be used to access value or premium markets?

3. Are there opportunities to partner or co-brand? What types of partners would serve to reduce limitations of the brand identity? Why types would enhance the identity? In each case would it be more appropriate to be a modifier brand or a modified brand?

4. Does the system deliver clarity to the customer? Or confusion? Does the system represent a clear, motivating sense of purpose to employees and partners? Could subbrands or subsubbrands be used to clarify or manage expectations?

5. Do the key brands have a brand identity? Are they actively managed?

A brand audit provides a start. The challenge is then to create a brand architecture, brand identities, and brand-building programs.