Brand Touchpoint Wheel -- Worksheet

A **Brand Touchpoint Wheel** helps you engage internal teams in working together to interpret and reinforce your brand appropriately at all touchpoints.   It's a visual representation of all your brand touchpoints and how different stakeholder groups impact them.

Follow these steps to develop one:

1. **Audit** – compile a list and collect examples of all the ways people in the outside world come into contact with your company and all the experiences your company provides.

   ❑ Select an organizing logic to plan your audit and categorize your findings. Possible approaches:
      a. **interactions** with customers **pre-purchase**, **purchase**, and **post-purchase** -- and then add **non-customer** interactions like corporate touchpoints
      b. **static** touchpoints like advertising or packaging, **people** touchpoints like call centers or salespeople, and **interactive** touchpoints like social media or websites
      c. **owned** vs. **shared** vs. **non-proprietary** touchpoints

   • *Tips:*
      • *remember to include all of your products – they're touchpoints!*
      • *start from the outside – identify the touchpoints your customers and other external stakeholder groups encounter, not the departments or functions of your organization*
      • *consider convening a cross-functional team to conduct the audit so you get more comprehensive results*

2. **Map** –
   ❑ List the internal group(s) responsible for each touchpoint and/or the functions that produce each touchpoint
   ❑ Identify the common groups/functions across touchpoints and compile the touchpoints by group/function
   • *Tip:*
      • *start from the touchpoint and identify which group(s) impacts it most directly; then work backwards to determine the other group(s) that might be involved*
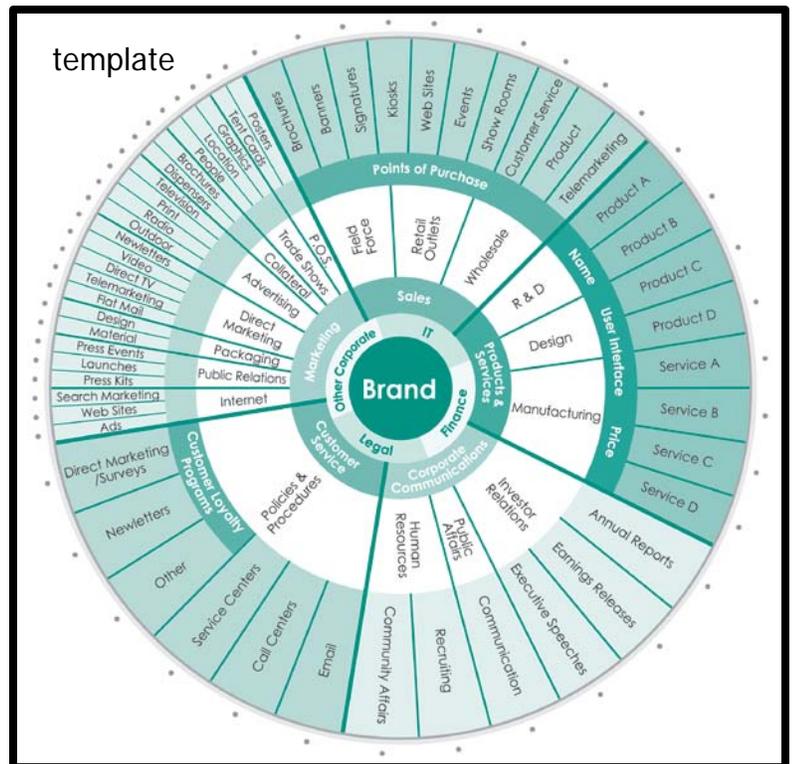
template

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3. **Assemble** – organize the list of touchpoints by group or function and then put together a wheel:
   - ❑ Put your brand in the center
   - ❑ Show the different groups and/or functions that impact touchpoints as spokes radiating out
   - ❑ Use layers inside the wheel to organize groups and functions together
   - ❑ Position all of the touchpoints on the rim based on the groups/functions
   - ❑ Share the wheel with various people in your organization to get feedback and be prepared to go through several rounds of draft wheels before a final version is set

4. **Evaluate** – evaluate the experience your company delivers at each touchpoint by using:
   - Consumer/customer research – conduct primary research to learn how your customers perceive your brand and how well they think you perform at each touchpoint
   - Self assessments – collect ratings from people throughout your organization (from leaders to frontline employees) on the company's performance at each touchpoint
   - Analyst and industry reports – review the publicly available commentary and data about your organization's execution compared to competitors'

5. **Prioritize** – designate the top 5 – 10 touchpoints that your organization should focus its efforts on right away. To prioritize touchpoints:
   - ❑ Use the sources of information from #4 to determine which touchpoints have the most impact on customers' and other outside stakeholders' expectations and experiences
     Tip: use stated and implied importance ratings in your research analysis
   - ❑ For the most impactful touchpoints, compare your performance (as indicated in step #4 above) to your brand platform and desired customer experience to illuminate which touchpoints are most out of alignment
   - ❑ For each of the touchpoints with the largest gaps, determine
     - the estimated cost of making improvements to it
     - the importance of it your company's longer term goals and objectives

   Rank each touchpoint by cost and iong-term importance.

6. **Act** -- create an action plan for optimizing the top touchpoints
   - ❑ Identify what you need to start doing, stop doing, continue doing to improve
   - ❑ Set a timeline with key milestones
   - ❑ Conduct follow-up consumer/customer research to compare your progress to the baseline measurement identified in step #4 above

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