

# M&A BRAND STRATEGY CHECKLIST

STAGE	BRAND STRATEGY ELEMENT	CONSIDERATIONS
PRE INTEGRATION	<input type="checkbox"/> <b>Brand Architecture</b>	How will the new entity's brand portfolio be structured? Will the target company's brand be kept intact, integrated into the existing brand, or will a new brand be created?
	<input type="checkbox"/> <b>Customer Segmentation</b>	How will the new entity segment its customer base, and what messaging and value proposition will be used to target each segment? How will CRMs be updated based on segmentation?
	<input type="checkbox"/> <b>Positioning, Category, Pricing</b>	How will the new entity be perceived in the market, and how will it differentiate itself from competitors? What categories will it compete in? How is pricing affected?
	<input type="checkbox"/> <b>Product Positioning</b>	How will the new entity's products or services be integrated, and how will branding be aligned with the product strategy?
	<input type="checkbox"/> <b>Value Proposition</b>	How will the new entity's value proposition be communicated to stakeholders, and how will it be differentiated from competitors?
MID INTEGRATION	<input type="checkbox"/> <b>Digital Strategy</b>	How will the new entity engage with and reach customers and stakeholders digitally? What touchpoints will need to be updated such as web properties, apps, email sequences and digital?
	<input type="checkbox"/> <b>Brand Identity + Messaging</b>	What visual and verbal elements will represent the new entity's brand, such as the logo, colour palette, typography, and tone of voice? Will any elements be modified or created anew?
	<input type="checkbox"/> <b>Employer Branding</b>	How will the new entity's employer brand be managed, and what messaging and branding will be used to attract and retain talent?
POST INTEGRATION	<input type="checkbox"/> <b>Location Branding</b>	Will the offices and workspaces need to be updated to undertake new branding? How will retail locations need to be updated?
	<input type="checkbox"/> <b>Marketing Programs</b>	How will campaigns and marketing channels differ after the merger? Will content and digital programs need to be restructured? How will data and analytics practices be updated?