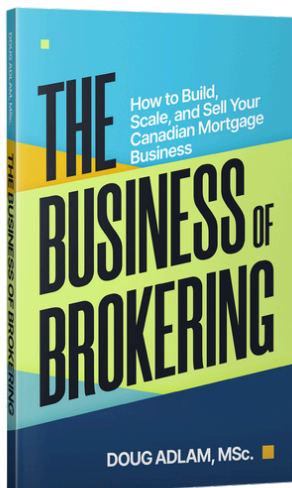




Chapter 6 – Worksheet

The ECONOMICS of Brand Equity



Purpose: Turn brand equity into financial results—pricing power, recruiting & retention, operational leverage, and exit value.



1) Brand Equity Snapshot (Today)

a) One-line brand promise (what clients can expect, every time):

b) Proof points (3):

1)

2)

3)

c) If I stepped away for 30 days, what would break? What would keep working?

Break:

Works:

2) Pricing Power Planner

a) Where do we compete primarily? ☐ Price ☐ Speed ☐ Quality/Value

b) Current average margin per funded deal: \$

c) Target uplift from brand (choose one): ☐ +\$250 ☐ +\$500 ☐ +\$1,000 ☐

Other: \$





d) Levers to justify premium (select & design):

- ☐ Signature process (named & visualized)
- ☐ Advisory depth (side-by-side options, scenarios)
- ☐ Service guarantees / SLAs (response times, milestone updates)
- ☐ Risk reduction (checklists, pre-underwrite, lender fit rationale)
- ☐ Post-close program (annual reviews, renewal roadmap)
- ☐ Social proof (case studies, testimonials, partner endorsements)

e) Objection handling narrative when undercut on rate:

3) Recruiting & Retention Engine

Ideal team member profile (skills, values, behaviors):

Differentiators that attract talent (beyond split):

4) Brand Equity Score (Quick Diagnostic)



Check all that are true today:

- ☐ We have a named, visual client process used by the whole team
- ☐ We publish current testimonials/case studies monthly
- ☐ Our response-time SLA is measured and met
- ☐ We can articulate a premium narrative without mentioning rate
- ☐ Renewal/anniversary journeys run automatically
- ☐ We track NPS/CSAT and close the loop on detractors
- ☐ Our brand voice guide is documented (Do/Don't say)
- ☐ Our CRM is portable and backed up (tested restore)
- ☐ Our brand attracts quality candidates without cold outreach
- ☐ I could step away 30 days without revenue collapsing

Score = # of boxes checked. Priority gaps:

5) Value-Add Ideas Plan

Pick 3 value-add ideas to implement this quarter (education, tools, concierge, partner co-marketing).

- 1) Idea: Owner: Launch by: KPI:
- 2) Idea: Owner: Launch by: KPI:
- 3) Idea: Owner: Launch by: KPI:





6) 90-Day Brand-to-Equity Roadmap

List 3 actions and due date:

1) Action: Due Date:

2) Action: Due Date:

3) Action: Due Date:

***Note: Brand equity compounds with consistent delivery.
Review monthly and tie to EOS scorecard.***

