

Portfolio Research Task

Purpose

Conduct comprehensive research on a client's brand portfolio and advertising campaigns to understand their marketing strategy, creative approach, and market performance.

Inputs

- Client company name
- Brand list (if known)
- Time period for analysis
- Research focus areas
- Specific campaigns of interest

Process

1. Brand Portfolio Mapping

Brand Identification:

- Identify all brands owned by client
- Document brand hierarchy and relationships
- Map parent-subsidiary structures
- Identify sub-brands and product lines
- Note brand acquisitions and divestitures

Brand Categorization:

- Categorize by product/service type
- Group by target audience
- Classify by market segment
- Identify brand architecture (house of brands vs. branded house)
- Note brand positioning relationships

2. Brand Profile Development

For each major brand:

Brand Overview:

- Brand name and tagline
- Brand history and evolution
- Brand positioning statement
- Target audience definition
- Brand personality and values

Market Position:

- Market share (if available)
- Competitive positioning
- Price positioning

- Distribution channels
- Geographic presence

Brand Performance:

- Sales performance (if available)
- Market growth trends
- Brand health metrics
- Consumer perception
- Brand equity indicators

3. Campaign Inventory

Campaign Discovery:

- Identify major advertising campaigns
- Document campaign timeline
- Note campaign themes and objectives
- Identify integrated campaigns
- Track campaign evolution over time

Campaign Categorization:

- By brand
- By time period
- By campaign type (launch, seasonal, promotional, etc.)
- By media channel
- By target audience

4. Campaign Deep Dive Analysis

For each significant campaign:

Campaign Background:

- Campaign name and tagline
- Launch date and duration
- Campaign objectives
- Target audience
- Budget (if available)

Strategic Foundation:

- Business challenge addressed
- Consumer insights leveraged
- Strategic positioning
- Key message and proposition
- Campaign strategy

Creative Execution:

- Creative concept and big idea
- Tagline and messaging
- Visual identity and design
- Tone and style
- Production quality
- Innovation and originality

Media Strategy:

- Media channels used

- Media mix and integration
- Channel-specific tactics
- Timing and sequencing
- Geographic rollout
- Budget allocation (if available)

Creative Assets:

- TV commercials
- Print advertisements
- Digital display ads
- Social media content
- Out-of-home advertising
- Radio spots
- Experiential activations
- Influencer content

5. Performance Analysis

Quantitative Metrics (when available):

- Reach and impressions
- Engagement rates
- Click-through rates
- Conversion rates
- Sales impact
- ROI metrics
- Brand lift metrics

Qualitative Impact:

- Media coverage and PR value
- Social media buzz and sentiment
- Cultural impact and conversation
- Brand perception changes
- Competitive response

Awards and Recognition:

- Industry awards won
- Award categories
- Creative recognition
- Effectiveness awards
- Case study publications

6. Creative Work Evaluation

Creative Quality Assessment:

- Originality and innovation
- Execution quality
- Brand consistency
- Emotional impact
- Memorability
- Cultural relevance

Creative Themes and Patterns:

- Recurring creative approaches

- Signature styles
- Consistent brand elements
- Evolution of creative direction
- Creative risk-taking

7. Strategic Partnership Research

Co-Branding Initiatives:

- Partnership brands
- Co-branding campaigns
- Partnership objectives
- Partnership outcomes

Sponsorships:

- Sponsored properties (sports, entertainment, etc.)
- Sponsorship activations
- Sponsorship integration
- Sponsorship ROI

Influencer Partnerships:

- Influencer collaborations
- Celebrity endorsements
- Brand ambassadors
- Influencer campaign integration

Cause Marketing:

- Social cause partnerships
- CSR initiatives
- Purpose-driven campaigns
- Community involvement

8. Competitive Campaign Analysis

Competitive Context:

- Competitor campaign activity
- Share of voice analysis
- Competitive creative approaches
- Competitive media strategies
- Differentiation assessment

9. Market Performance Research

Sales and Market Data:

- Sales trends by brand
- Market share trends
- Category growth rates
- Pricing trends
- Distribution expansion

Consumer Research (if available):

- Brand awareness metrics
- Brand consideration
- Purchase intent
- Customer satisfaction

- Net Promoter Score
- Brand loyalty indicators

10. Insights and Pattern Identification

Strategic Patterns:

- Consistent strategic approaches
- Positioning evolution
- Target audience shifts
- Message consistency
- Innovation patterns

Creative Patterns:

- Creative themes and motifs
- Execution styles
- Production approaches
- Talent and partnerships
- Risk-taking patterns

Media Patterns:

- Channel preferences
- Media mix evolution
- Digital transformation
- Emerging channel adoption
- Budget allocation trends

Performance Patterns:

- Success factors
- Failure patterns
- Seasonal trends
- Category dynamics
- Competitive responses

Data Sources

Primary Sources

- Brand websites and microsites
- Campaign websites and landing pages
- Brand social media accounts
- Official press releases
- Annual reports and investor presentations

Secondary Sources

- Advertising databases (Ads of the World, Campaign, etc.)
- Award show archives (Cannes Lions, Effies, Clios, etc.)
- Industry publications and trade journals
- News articles and media coverage
- Case study publications
- Agency portfolios and websites

Social Media Sources

- Brand social media accounts
- Campaign hashtags
- User-generated content
- Influencer content
- Social media ads library

Research Sources

- Market research reports
- Consumer research studies
- Brand tracking studies
- Industry analyst reports
- Competitive intelligence reports

Outputs

- Brand portfolio map and overview
- Brand profiles for major brands
- Campaign inventory and timeline
- Campaign analysis reports
- Creative work showcase
- Performance metrics summary
- Strategic partnership inventory
- Competitive context analysis
- Insights and patterns report
- Recommendations for consideration

Success Criteria

- Comprehensive brand portfolio mapped
- Major campaigns identified and analyzed
- Creative work documented and evaluated
- Performance data collected (where available)
- Strategic patterns identified
- Competitive context provided
- Actionable insights generated
- Professional documentation quality

Quality Checks

- [] All major brands identified
- [] Brand relationships mapped
- [] Campaign inventory complete
- [] Campaign analysis thorough
- [] Creative work documented
- [] Performance data collected

- [] Strategic partnerships identified
- [] Competitive context included
- [] Patterns and insights identified
- [] Sources properly documented
- [] Ready for synthesis

Related

- @agent:client-portfolio-agent
- @template:portfolio-analysis-tmpl
- @template:campaign-analysis-tmpl
- @task:campaign-analysis
- @task:web-scraping-research
- @task:social-media-data-collection
- @checklist:campaign-analysis-checklist

Best Practices

- Start with official brand sources
- Use multiple sources to validate information
- Document campaign evolution over time
- Capture visual examples of creative work
- Track performance metrics systematically
- Identify both successes and failures
- Look for patterns across campaigns
- Consider competitive context
- Focus on strategic insights
- Maintain organized research files
- Update regularly as new campaigns launch
- Collaborate with company research agent for context