

BRANDING  
STRATEGY

INCORPORATE: **DESIGN**

IDENTITY  
COMMUNICATIONS  
PRINT  
DIGITAL  
ENVIRONMENT

# Realise the value of a strong brand in private equity

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Benchmark in Private Equity III

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Autumn 2018

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See where your firm ranks amongst your competitors

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# Where does your firm stand amongst the competition?

The strength of your brand is a valuable business asset, especially in a competitive market. We have scored the brand strength of 16 private equity (PE) firms who invest up to £50M in European investments.

See where your firm scored amongst its competitors.

Rank	Firm	Score %
1	True Capital	66%
2	Rutland Partners	63%
3	NorthEdge Capital	58%
3	Palatine Private Equity	58%
5	Growth Capital Partners	57%
5	MML Capital Partners	57%
7	Synova Capital	54%
8	Stage Capital	51%
9	Total Capital Partners	44%
9	Primary Capital Partners	44%
11	Gsquare Healthcare Private Equity	38%
12	Ancala Partners	36%
13	ESO Capital	31%
13	Cabot Square Capital	31%
15	August Equity	26%
16	Columna Capital	22%

A close-up photograph of a person's hands. The right hand is holding a black pen, and the left hand is holding a pair of glasses. The background is dark and out of focus. Overlaid on the image is the text "WHY IS YOUR BRAND IMPORTANT?" in a white, bold, brush-stroke font.

**WHY IS  
YOUR BRAND  
IMPORTANT?**

# It's a tough market out there

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Healthy gains in buyout value and exits meant that 2017 was a strong year in the global PE industry. However, firms are still facing a number of key challenges.

## Winning deals

Earning a fair share of the market has become more challenging due to growing competition in the mergers and acquisition market. Globally, PE only accounts for 8% of the total deal count in the market<sup>1</sup>. PE firms face stiff competition from corporations, alternative lenders as well as other existing and new PE players as they compete to stand out as the firm of choice.

## Growing returns

Delivering attractive returns takes more than passive investments; firms need to add value over and above the capital they bring. It has become a necessity to offer investments a catalogue of benefits to stimulate greater growth, take advantage of new opportunities and resiliently deal with issues that arise.

## Reducing capital overhang

Global data shows that PE firms are not deploying capital as fast as they are raising it. Between 2014-2017 the number of deals done in the PE industry declined by 19% but the amount of capital committed to funds rose by 12% per annum<sup>1</sup>. The stress of capital overhang demands that firms are more innovative and transformative to secure investments.

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<sup>1</sup> Rose, G. (2018). How PE funds need to start acting more like corporate buyers. Accessed 24 September 2018. Retrieved from <https://www.bain.com/insights/graham-rose-how-PE-funds-need-to-start-acting-more-like-corporate-buyers-video/>

# But it doesn't have to be

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Time and time again, we see that the value of a strong brand is under realised. Strong brands deliver a plethora of valuable benefits to organisations and the good news for PE firms is these benefits directly address the challenges they are facing.

## **Stand out from the crowd**

A strong brand is explicit and compelling in articulating what is being offered and to whom. It allows firms to differentiate themselves from their competitors in a way that resonates with the audiences they are seeking to work with. This connection makes it easier for target audiences to choose the right brand for them; ensuring firms are more effective at winning the deals they want.

## **Enhanced strategic leadership**

A strong brand acts as a North Star, guiding the current activity and future development of an organisation. The execution of strategic decisions is focused and efficient; preventing

time, effort and money being wasted in the pursuit of conflicting paths of action that do not lead to the right deals or yield attractive returns.

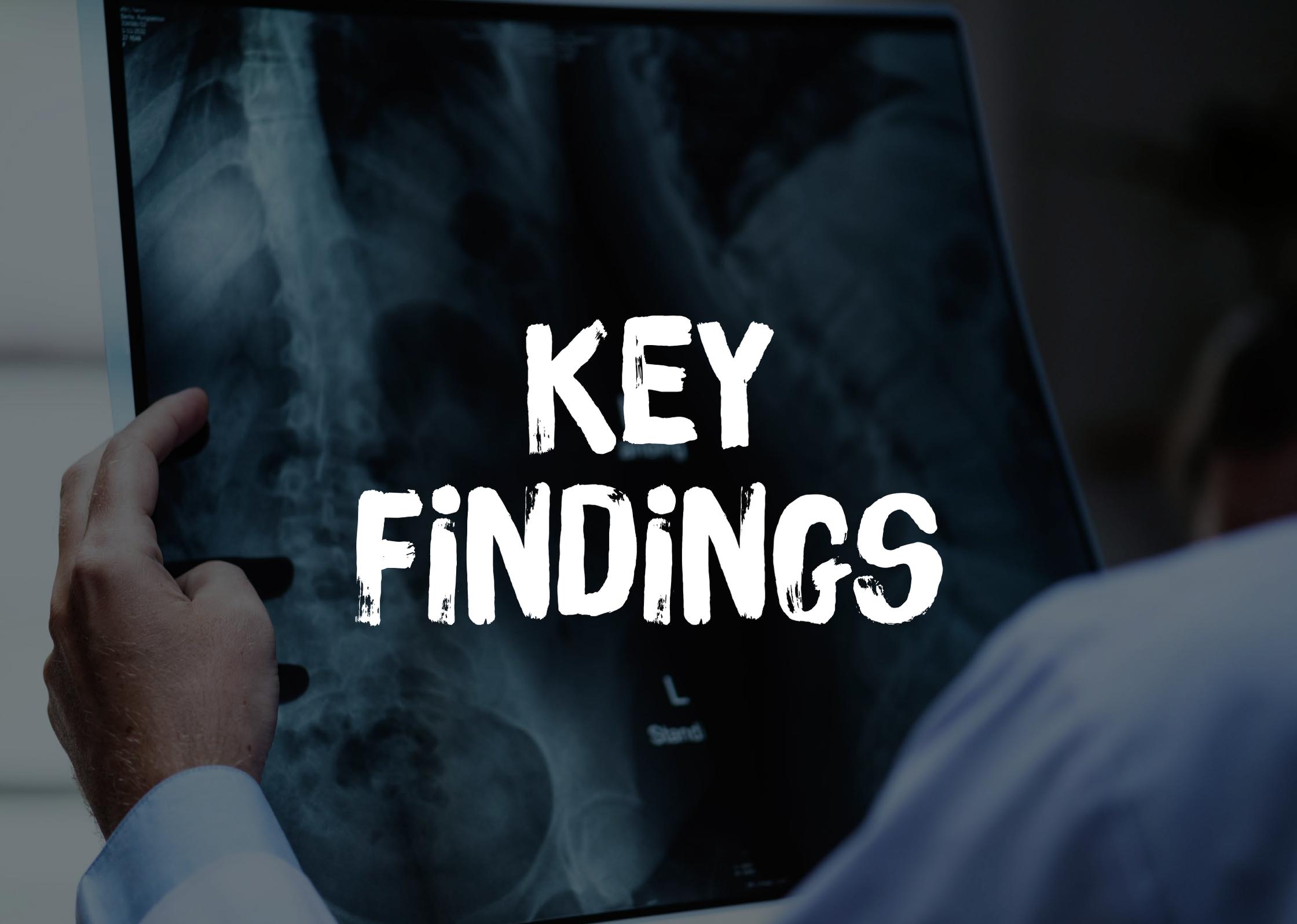
## **Unified company culture**

A strong brand sets and maintains a clear and purposeful direction that shapes a company culture, taking control rather than leaving it to work itself out. A company's culture not only attracts and retains talented employees, it inspires employees to work towards a common goal and uphold the brand's values. This unified culture amplifies the communication of a firm's brand, bolstering differentiation from competitors and driving business performance.

“100% of PE firm executives say having a strong brand is important”  
– *BackBay Communications, (2017)*<sup>2</sup>

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<sup>2</sup> BackBay Communications, (2017). Brand building more important than ever for private equity firms. Accessed 22 November 2018. Retrieved from <http://www.backbaycommunications.com/news/whitepapers/brand-building-more-important-than-ever-for-private-equity-firms/>

A hand in a light blue sleeve holds a large X-ray film. The film shows a skeletal scan of a human torso. Overlaid on the center of the film is the text "KEY FINDINGS" in a white, bold, brush-stroke font. The background is dark and out of focus.

# KEY FINDINGS

# Sector insights



**0 out of 16** firms met our brand strength benchmark of 70%.

## Where can firms improve?



# 44%

Average score across all firms for online brand experience.

## Where are firms excelling?

The top firms scored more than five times higher for personality than the bottom ranked firms.

Top 2 firms

## 5.5/7



Bottom 2 firms

## 1.0/7

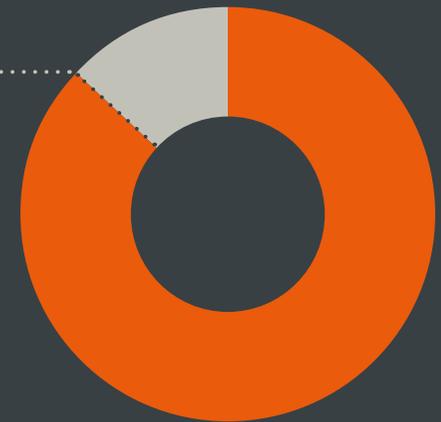


# 4

**4 out of 16** firms have a strong hook to draw in the right audience compared to 10 firms who did not have one at all.

# 87%

of firms don't stand for a purpose beyond providing capital.



Only two firms met our benchmark for producing and sharing original content.

### Original Content



### Sharing Content

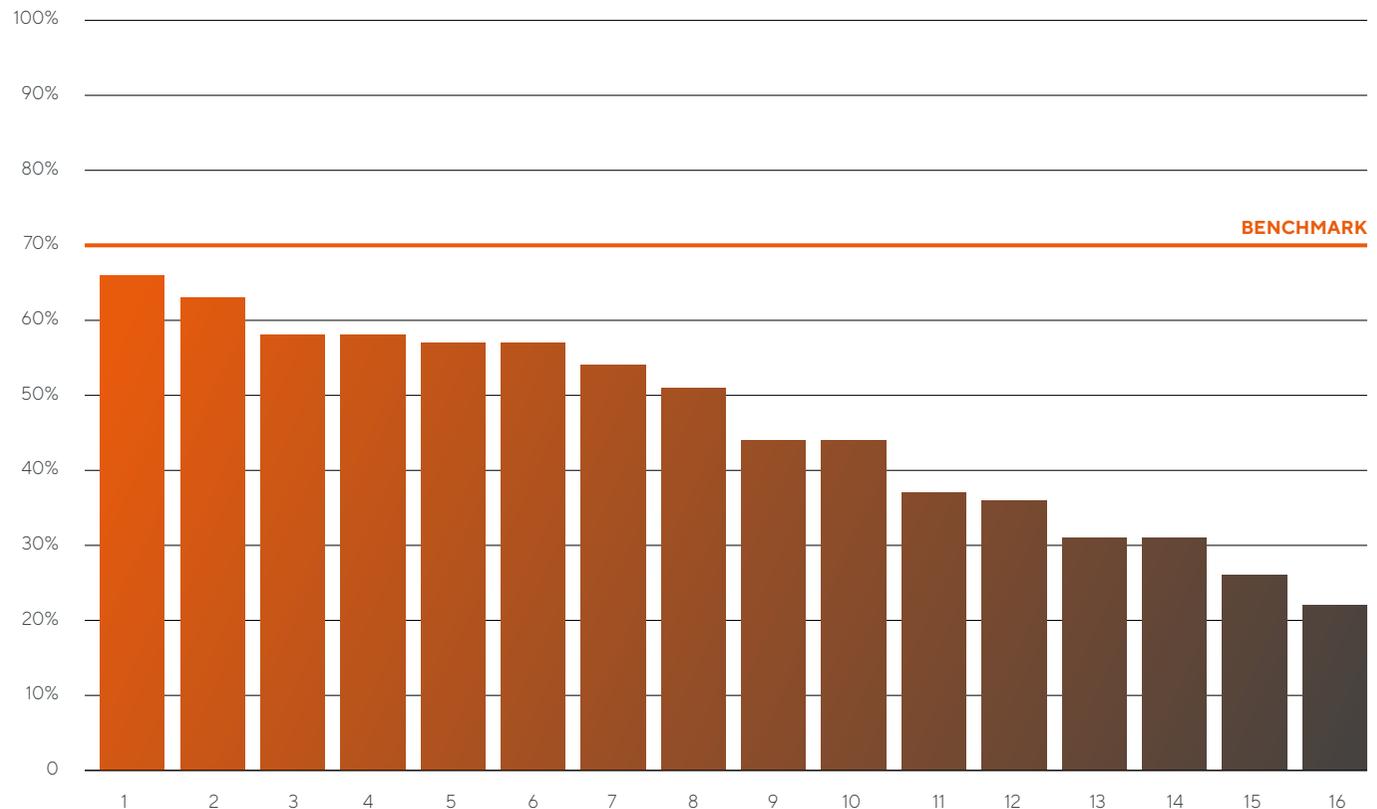


BENCHMARK

# An unmissable opportunity to gain the early mover advantage

None of the 16 firms in our research met our overall brand strength benchmark score of 70%. In our opinion, brands in our sample do not stand out from their competitors and deeply resonate with their target audiences. It is easy to be indifferent to brands in this segment of the PE industry.

Brand strength scores for the 16 firms included in our sample



There is an unmissable opportunity, for firms willing to invest in the development of a more robust brand, to establish a discernible brand driven advantage over their competitors. A stronger brand will enable firms to:

- › **Win more deals** by differentiating the firm in a way that resonates with their target audiences.
- › **Reduce capital overhang** by acting as a North Star for both leadership teams and staff to guide focused and efficient business performance.
- › **Grow attractive returns** by positioning the firm in a clear defensible territory that leverages the firm's strengths and market opportunities.

# Six essential take-homes from this report

## Let people know what you stand for; it's necessary not optional

With increasing competition in the PE marketplace, investees and investors have the power to define the value of your offering. They are looking beyond your capital and credentials. They are looking for firms that align with their own beliefs and principles, and will choose a firm that they are happy and proud to work with.

## 63% of firms do not have a strong hook to draw in their target audience

Everyday we are bombarded with thousands of marketing messages. Unsurprisingly the human brain can only recall a small percentage of these. Firms need to ensure their brand remains memorable beyond the sector's hygiene factors. A strong hook should highlight what makes you different, meaning you won't be easily ignored or forgotten and lose out on valuable deals and opportunities.

## Stronger brands have an authentic and distinctive personality

The top two firms met our benchmark score for personality with an average score of 5.5 out of 7. The personality your brand portrays across all touch points influences the connection audiences have with your firm. This not only includes the photos on your website, but also the tone of voice in what you are saying.

## All firms in our research risk losing their online audiences

In today's time poor society, you need to assertively signpost people to engage with you at the point of inspiration. Without this, firms run the risk of people leaving the website before they have taken any action, potentially never to return. The average score for calls to action for firms in our research was 2.31 out of 7, well below our benchmark score of 5 out of 7.

## Brands are struggling to keep up with rising expectations

Firms scored only 44% for online brand experience, highlighting that brand experience is low on the agenda for PE firms in this sample. A good online brand experience increases the likelihood of target audiences taking a positive action to engage with your firm. Think about how your customers use your website and what they want to find out, rather than assuming they want to hear what you have to say about yourself.

## Your firm could be first to realise the value of a strong brand

With the challenges PE firms are facing and the key finding of a below par brand strength across this segment of the industry, we believe there is an unmissable opportunity for PE firms to be first to gain a competitive advantage. For some it's a few areas of improvement but for others it's a bigger investment; but it's worth it!

# How did we measure your brand strength?

We explored the websites and social media platforms of 16 UK based mid-market private equity firms investing up to £50M in Europe. Our panel of branding experts independently scored firms on the illustrated 14 key components of a strong brand (see what we looked for on p27-28). Scores were allocated on a 7-point scale based purely on our collective perception from the websites and social media platforms we visited.

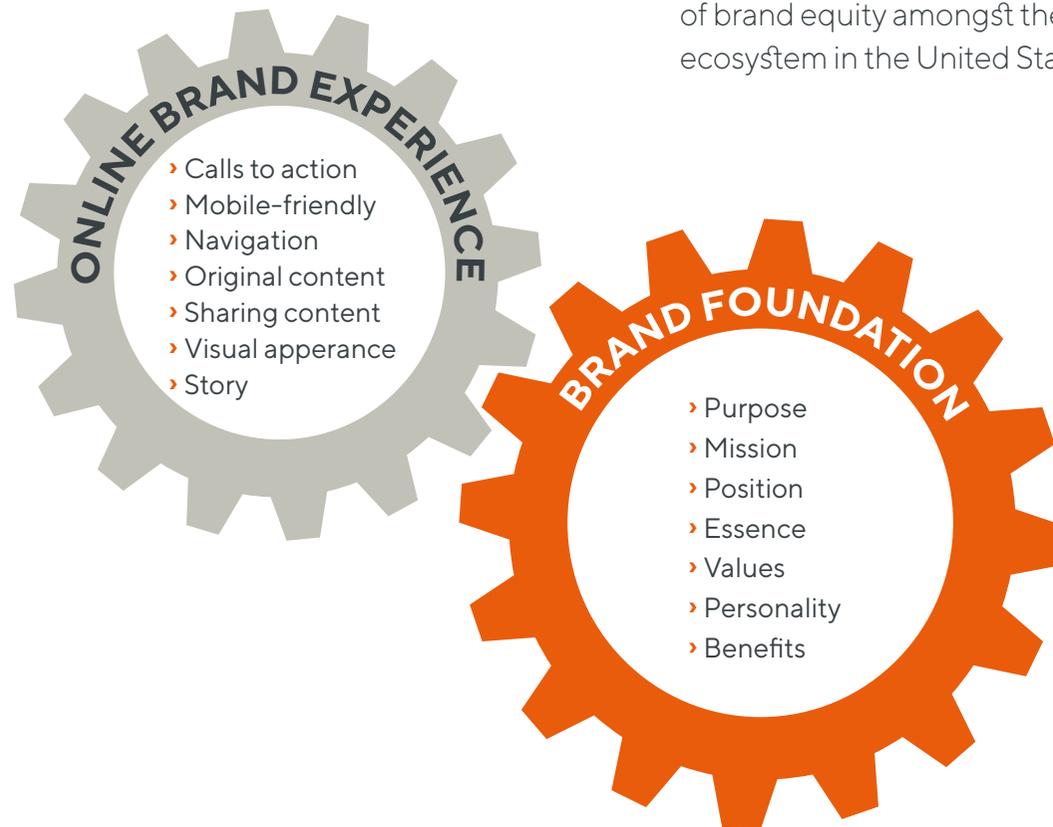
To receive a breakdown of your firm's scores contact Ed Bowes at [ed@incorporatedesign.co.uk](mailto:ed@incorporatedesign.co.uk)

## What is a good score?

We believe that brands should be aiming to score at least 5 out of 7 (70%). This score enables brands to stand out from competitors and grow positive brand equity. Therefore we have used this benchmark throughout our analysis and report.

## What will you get from this report?

This report identifies how the top firms scored more points. We also consider how our findings relate to industry relevant insight and opinions, including a series of studies called *Private Equity Brand Equity* conducted by BackBay Communications between 2009 and 2017. The research looked at the perceived relevance of brand equity amongst the private equity ecosystem in the United States and Europe.



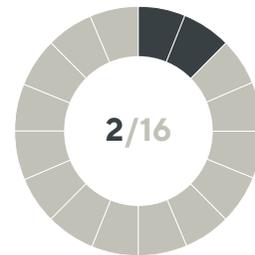
A close-up photograph of a person wearing blue-rimmed sunglasses and holding a magnifying glass over their face. The person is wearing a dark, horizontally striped shirt. The background is dark and out of focus. Overlaid on the image is the text "SCORE ANALYSIS" in a white, bold, brush-stroke font. The text is centered horizontally and spans across the middle of the image, partially overlapping the magnifying glass and the person's face.

# SCORE ANALYSIS

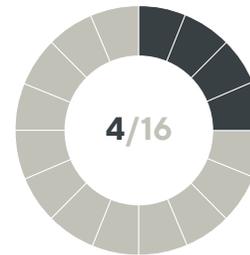
# Purpose and Values: How are you changing the world for the better?

Only 13% of firms in our research met our benchmark for purpose and values. Even the top two firms are not excelling at articulating these tenets, scoring an average of just 3.5 out of 7 for both.

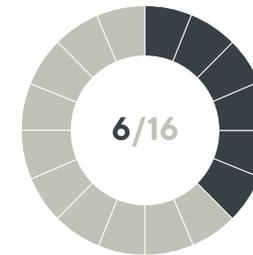
The number of firms that met our benchmark score



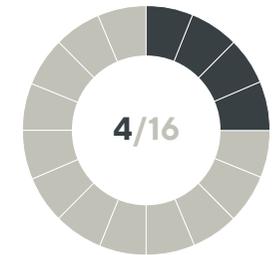
Purpose



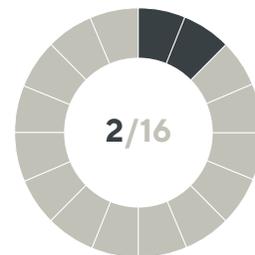
Mission



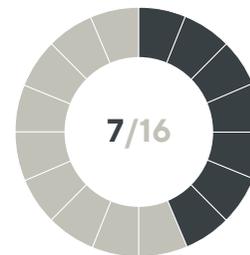
Position



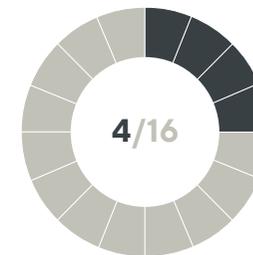
Essence



Values



Personality



Benefits

It's not just us who think purpose is important. The Harvard Business Review and EY's Beacon Institute found that 58% of companies with a clearly articulated and understood purpose experienced a revenue growth of +10% over a three-year period. Compared to 42% of companies with a purpose that was not well understood or communicated who experienced a plateau or decline in revenue growth over the same period<sup>3</sup>.

<sup>3</sup> Harvard Business Review, (2015). The business case for purpose. Accessed 21 November 2018. Retrieved from <https://www.ey.com/Publication/vwLUAssets/ey-the-business-case-for-purpose/%24FILE/ey-the-business-case-for-purpose.pdf>

# Purpose and Values: How are you changing the world for the better?

People looking to secure or invest funds have more options than ever and are considering your firm's offer beyond capital and credentials. They want to know why your firm exists, what your ultimate goal is and how you work. They can then assess how this aligns with their own beliefs and principles to decide if you are the right firm for them.

"If people believe they share values with a company, they will stay loyal to the brand"

*Howard Shultz, CEO of Starbucks*

## SPOTLIGHT:

### Recognising best practice

We were impressed with the purpose and values articulated by these firms:

#### **Purpose: NorthEdge Capital**

NorthEdge Capital's purpose is to "shape global markets from the regional powerhouses". Their belief in the potential of economies outside the capital will unite customers and culture alike, bringing efficiency and focus to their business performance.

#### **Values: Growth Capital Partners**

Growth Capital Partners clearly outline and explain their six core values in their *How we work with you* section. These values act as guiding principles for the way the firm engages with all its audiences, including staff, stakeholders, investors and investees. Stating them so clearly on their website sets out their stall and allows audiences to easily understand how they work.

# Essence: What makes you different?

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Only 4 out of 16 firms met our benchmark for essence and ten firms did not have one at all. Strong brands hook their audience with a clear, simple statement that sums up why their company exists. We call this their essence.

For B2C businesses, an essence is a staple part of their brand and we will all recognise examples such as McDonalds' "I'm lovin' it", Apple's "Think different", BMW's "The ultimate driving machine" and Avis' "We try harder". But the value of a good essence isn't just confined to B2C businesses. In the PE industry where firms all offer capital, a good essence enables audiences to efficiently differentiate firms, understand the key benefits on offer and remember them.

It's important to do more than pay lip service to your sector hygiene factors – those attributes without which no PE firm would justifiably remain in business. You need to find what makes you different – not what makes you the same.

“Having a strong brand that keeps popping up in a positive way that has real teeth and attributes is critical”  
– *Graham Hearn,*  
*The Riverside Company*<sup>4</sup>

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<sup>4</sup> BackBay Communications. (2014). Private Equity Brand Equity III. Accessed 8 June 2018. Retrieved from <http://backbaycommunications.com/news/in-the-news/private-equity-brand-equity-iii/>

# Essence: What makes you different?

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## Our senses are overwhelmed

Did you know that on average we are exposed to 5,000 marketing messages every day<sup>5</sup>. This is a lot of information for the human brain to digest so it is no surprise that we can only recall a small percentage of the brands we see. This means that firms not only need to stand out from the crowd to penetrate the market, they also need to ensure their brand remains memorable. Without a strong hook, audience's will ignore or forget a brand and firms risk losing out on valuable deals and opportunities.

## The sweet scent

A study published in the Journal of Business Research in 2014, found that the liking for a slogan is driven largely by the clarity of the message, the exposition of the benefits, rhymes, and creativity<sup>6</sup>. Essences are crafted from a well-defined purpose that is part of a robust brand foundation. The sweetest essences are not only concise and catchy but they are also customer focussed; they are as irresistible to their target audience as nectar is to bees!

## SPOTLIGHT:

### Rutland Partners - A Catalyst for Change

We liked Rutland Partners' essence of "A Catalyst for Change" because it recognises their role to act as a stimulus to increase the rate or scale of change in a business. Their focus on a *catalyst* rather than *investment* and *change* rather than *growth* means that they appeal to the ambitions of a range of audiences and broaden their potential scope of influence. It becomes about more than money - it's a genuine emotional appeal to potential investees.

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<sup>5</sup> Tunikova, O. (2018). How many Ads do you actually see daily? Accessed 24 September 2018. Retrieved from <https://stopad.io/blog/ads-seen-daily>.

<sup>6</sup> Dass, K., Kohli, C., Kumar, P. and Thomas, S. (2014). A study of the antecedents of slogan liking, Journal of Business Research, Elsevier, vol. 67(12), pages 2504-2511.

# Personality: If your brand was a person, how would they behave?

The top two firms met our benchmark score for personality with an average score of 5.5 out of 7, whereas the bottom two firms scored an average of just 1 out of 7. This large variance indicates that personality is a key differentiator in overall brand strength.

It's not enough to simply have a website that looks good. The human traits your brand portrays across all touch points is vital to engaging the right audience. Your personality helps audiences to decide if they like or dislike you, and if they will engage with you or not; self-selecting the people you want to do business with.



# Personality: If your brand was a person, how would they behave?

## Be distinctive and authentic

Your personality should be a true reflection of your brand and what you have to offer. This not only allows audiences to differentiate you from your competitors but it also helps target audiences to build a strong emotional bond with your firm.

Take Apple for example. If their brand was a person what would they be like?

Creative, innovation trailblazers, stylish, minimal, super-confident, slightly obsessive, the cool kid on the block.

These traits may not be attractive to everyone, but they are woven throughout the business, from the in-store-experiences, website and advertising to the product features and range. The result, Apple is the largest company in the world by market value in 2018<sup>7</sup>.

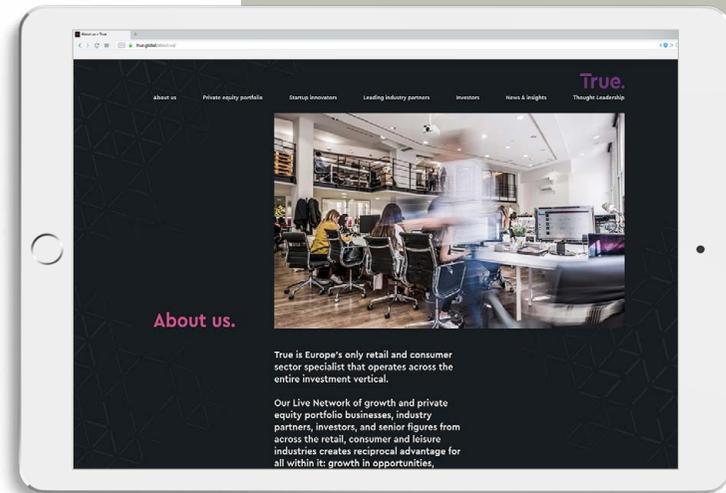
## Be professional and approachable

The easiest way to show your human side is to have photos of real people on your website. All too often we see PE firm websites with images of city skylines and boardroom scenes. Your choice of imagery is important. By all means demonstrate your professionalism in the industry, but also consider how you visually welcome new visitors and convey your unique personality.

## SPOTLIGHT:

### True Capital

True Capital's website expresses a distinctive and appropriate personality that amplifies their brand and its positioning. The language and imagery used is conversational, dynamic and exudes their expertise in the retail industry.



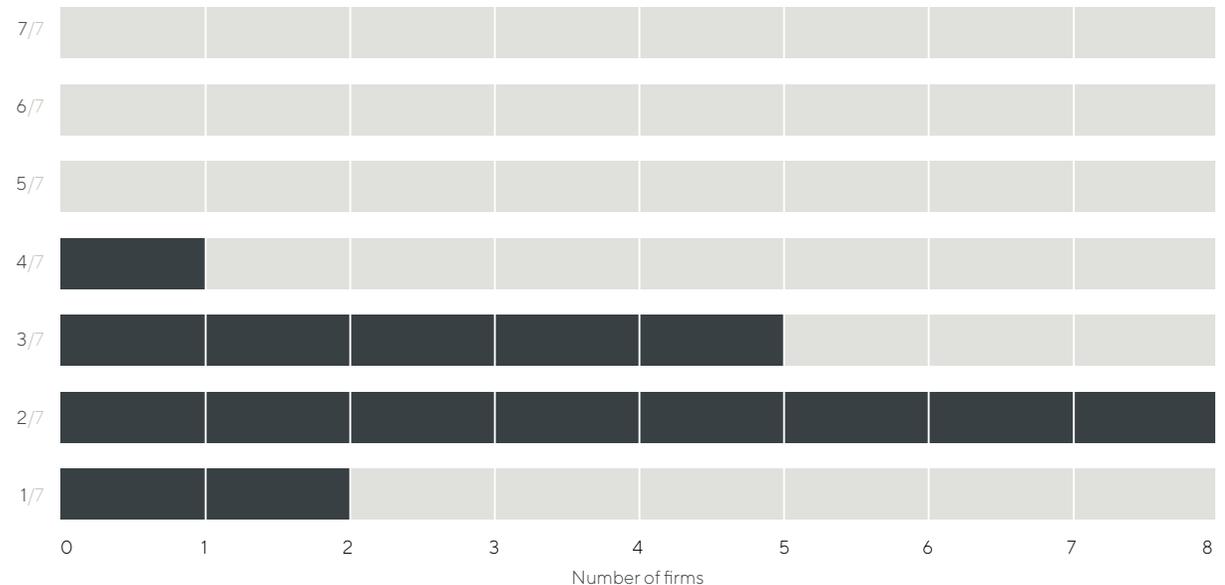
<sup>7</sup> Statista, (2018). The 100 largest companies in the world by market value in 2018. Accessed on 21 November 2018. Retrieved from <https://www.statista.com/statistics/263264/top-companies-in-the-world-by-market-value/>

# Calls to action: Firms need to plug their leaky sales funnel

With 50% of firms scoring only 2 out of 7 for Calls to action and the highest score from all firms in our research being 4, its no surprise that the average score for firms in this segment for this tenet was poor at only 2.31 out of 7.

Every page of your website initiates or continues a relationship; acting as a sales funnel for your business. Few websites we visited wrote their calls to action in an inspiring manner and placed them in optimum locations. In today's time poor society, you need to assertively signpost people to engage with you at the point of inspiration. Without this, firms run the risk of people leaving their website before they have taken any action; a sales funnel with leaks.

The number of firms that scored 1-7 for Calls to action



# Calls to action: Firms need to plug their leaky sales funnel

Firms cannot assume target audiences will want to engage with them and go out of their way to find out how to do so. They need to nurture their audience, encouraging them to take action by making content that is engaging, relevant and explicit about what to do next.

Take our example below, if you were an entrepreneur looking to grow a sports clothing company and you visited two websites stating the following, which firm would inspire you to engage with them?

## FIRM 1

- › We are seeking new investment opportunities.
- › We prefer businesses in the consumer, infrastructure and healthcare sectors.
- › We back people with the ambition to grow their business.

## FIRM 2

We can help retail businesses make a step change. If you are looking to:

- Develop into new markets
- Launch new product lines
- Expand into new geographical territories

Contact us to talk about  
how we can help you

Complete our application form  
to apply for funding now

# Brand experience: Keeping pace with customer expectations

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Only 1 out of 16 firms met our benchmark for online brand experience and the average score across the board was 44% (fair). This indicates to us that effectively delivering a high quality online brand experience needs more attention from the majority of firms.

Potential customers will visit your website with an ambition or challenge already in mind. They are looking for someone to help them move forward. A meaningful user experience takes them on a journey that aligns your firm's capabilities with the customer's requirements and delivers a positive perception of your firm. If this is achieved, the likelihood of the customer taking positive action to engage your firm is increased.

We looked at four key aspects that impact online brand experience.

## Original content

Only one firm met our benchmark for both producing and sharing original content, highlighting that this isn't something firms in our research invest much resources in. Conversely, according to BackBay Communications (2018), "63% of the top 100 global private equity firms are leveraging marketing content to differentiate their brand in a crowded market"<sup>8</sup>.

As the pressure of making attractive returns grows, firms need to consider ways they can add value to their investments beyond giving capital. Sharing expertise and insights is a good way of doing this. It stimulates organic business growth, facilitates collaboration, ignites innovation in investee businesses as well as transforms the personal growth of those you work with.

## Navigation

Only 19% of firms met our benchmark for navigation. The majority of websites falling shy of this benchmark are used as a podium to shout about what firms are doing rather than how and why investees can benefit.

People visit your site to decide if you can help them. Firms need to ensure their site is customer focused with well-labeled pages, good information hierarchy and links that lead to related content. Think about how your customer will use your website and what they want to find out, rather than assuming they want to hear what you have to say about yourself.

## Story

Only 6 out of 16 firms met our benchmark for a compelling narrative. To avoid becoming a commodity, firms need to frame what they have to offer as something that others care about and want to read more about.

The narrative of your website needs to align with your brand to maximise the chances of a good customer experience. Weaving your brand position through the different sections, crafting your portfolio pages to reflect the delivery of your brand mission and letting your personality shine through in your team pages, helps to deliver a strong brand story.

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<sup>8</sup> BackBay Communications, (2018). Content marketing gains traction in private equity. Accessed on 22 November 2018. Retrieved from <http://www.backbaycommunications.com/news/whitepapers/content-marketing-gains-traction-in-private-equity/>

# Brand experience: Keeping pace with customer expectations

## Mobile-friendly

44% of firms did not meet our mobile-friendly benchmark and 38% of websites we visited are not secure. These firms are at risk of being overlooked as visitors leave the site, never to return, and opportunities for new deals and return growth walk out the door.

People today expect to be able to access information online anytime and anywhere. In 2009 only 0.7% of web traffic worldwide was generated through mobile phones, but in 2018 this rose to 52.2%<sup>9</sup>. Google Chrome recognises this consumer demand and is now blacklisting sites that do not possess a SSL certificate and show a https prefix.

<sup>9</sup> Statista, (2018). Percentage of all global web pages served to mobile phones from 2009 to 2018. Accessed 19 July 2018. Retrieved from <https://www.statista.com/statistics/241462/global-mobile-phone-website-traffic-share/>

## Not mobile-friendly



## Mobile-friendly



100% responders

5\$ each

84% conversation rate

Costs:  $\frac{\$42,000}{}$   
 $= 7,843 / \text{yr}$

89%

Upcoming Campaign



Response Rate  $\rightarrow$  10%  
Correct, how?

Response Rate  $\rightarrow$  53%  
Purchase  $\rightarrow$  \$14,000

# THE SCORES

# How did firms score, including yours?

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A personalised scorecard has been created for each firm in the research, including a breakdown of your scores for each of the 14 tenets. As an example, the top firm's scorecard is included on page 26 followed by an outline of what we looked for with each of the tenets.

## How can this information be utilised?

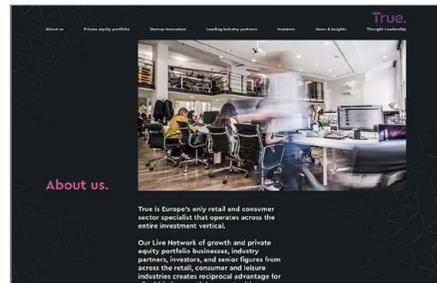
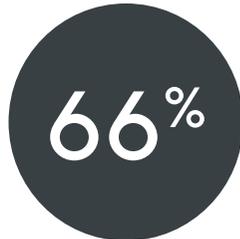
This report is a measure of our perception, as brand experts, of brands in this segment of the private equity industry. We have benchmarked firms based on our opinion and this overview should be considered alongside further exploratory work with senior partners, staff and clients to form a comprehensive review of your brand strength.

If you wish to receive your firm's scorecard contact Ed Bowes at [ed@incorporatedesign.co.uk](mailto:ed@incorporatedesign.co.uk)

# Scorecard: True Capital

Ranking

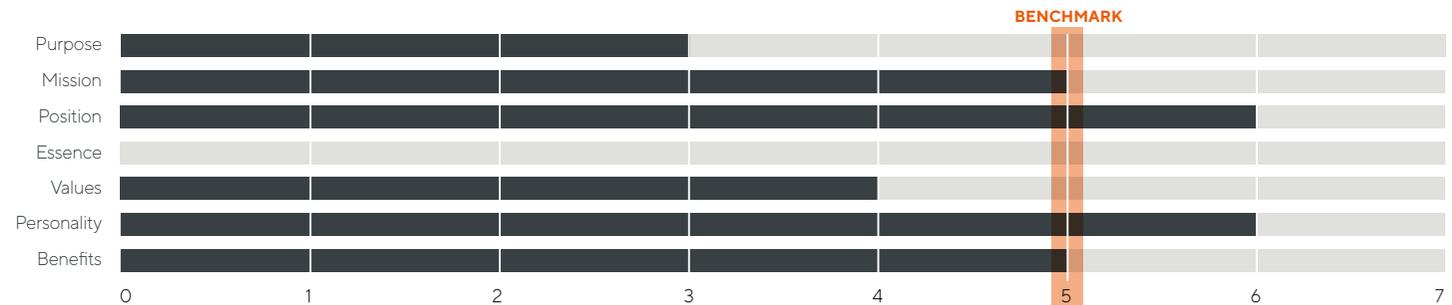
Score



True is Europe's only retail and consumer sector specialist, that operates across the entire investment vertical.

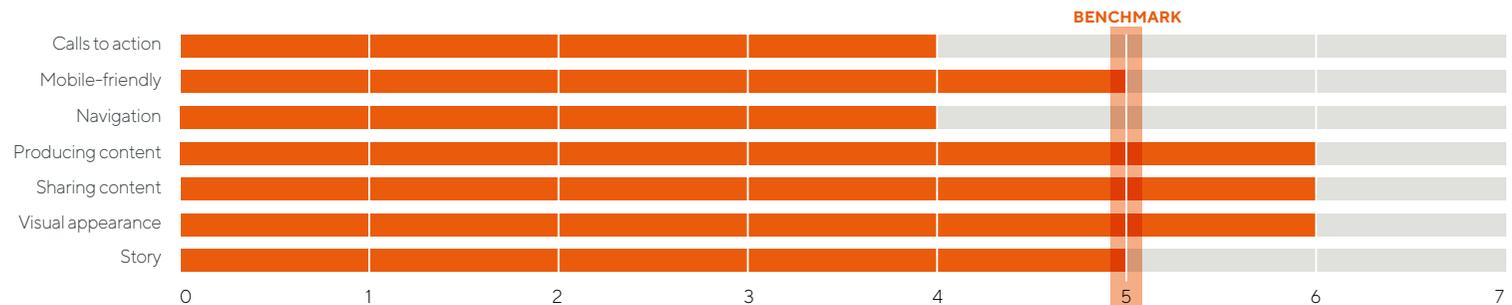
Brand Foundation score

29 / 49



Online brand experience score

36 / 49



Scores at or above benchmark

9 / 14

## Your brand is strong but you could be yielding even greater returns

You met our benchmark for a good number of core brand elements, but there are a few areas that could do with improving. Investing time to ensure that all elements are strong and working in harmony will strengthen your brand further.

# What we looked for

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## BRAND FOUNDATION

### Purpose

Does the brand articulate its ultimate goal and what the world will look like when it has accomplished it? Does it stand for anything more than making a profit?

### Mission

Is there a narrative that describes what they will do to fulfil their purpose? How will it make its dream a reality?

### Position

Does the brand orientate itself within its competitive context in a meaningful way to its intended customers? Is it genuinely different from competitors or generic to the sector? Is content clearly targeted towards its intended audience?

### Essence

Is there a single concise articulation of the brand promise – perhaps used as a strapline or a homepage headline? Is it engaging and memorable?

### Values

Are the brand's values explicitly articulated? Are their reasons to win business clear or do they focus on the reasons to do business in their sector? Does it feel like they stand for something?

### Personality

Does the brand use a distinctive and consistent tone of voice? Does it feel authentic and in line with the brand? Does it communicate in a conversational, human way, or does it sound like a faceless corporation?

### Benefits

Are the selling points clearly articulated? Can you ascertain how or why what they offer is better or different from their competitors?

# What we looked for

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## ONLINE BRAND EXPERIENCE

### Calls to action

How easy is it to get in contact with them? Can you initiate contact immediately once you have made the decision to do so? Are you inspired to take an action to engage with the brand?

### Mobile friendliness

Does the website respond to different size screens? Does the content and functionality change to optimize the experience on any particular device?

### Navigation

How easy is it to find your way to the information you require? Are there dead-end silos or are you encouraged to explore further information at the end of each page. Does the information architecture work so that each element of information is in the place where you expect it?

### Original content

Is there interesting content that goes beyond explicit sales messages? Are there articles of insight and opinion that demonstrate expertise and thought leadership? Is information delivered through a variety of media: text, podcasts, video etc.

### Sharing content

Is original content published on social channels or third party publishers as well as on their website? What level of likes, shares, or views is this content attracting?

### Visual appearance

How impactful is the first impression? Does it continue consistently? As you read about the organization, does the visual expression feel in line with what you are reading – is the brand coherently expressed?

### Story

Does the website take the visitor on a journey or just present them with nuggets of information. Do case studies have a compelling narrative? Does it encourage you to read more, or are you bored? Is it a 'Why?' story, a 'How?' story or a 'What' story?

**INCORPORATE:DESIGN**

THROUGH TEAMWORK  
WE TRIUMPH  
CREATING IDEAS THAT INFLUENCE  
& INSPIRE

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