MTP INTELLIGENCE

BRAND ALIGNMENT FRAMEWORK

Three-Layer Discovery Questionnaire

A reusable instrument for evaluating any client against the Brand Alignment Framework

HOW TO USE

This questionnaire is designed to be administered in three passes. The first two layers can be completed by the agency account team using internal knowledge. The third layer almost always requires a client conversation — at minimum a strategy or analytics lead, ideally a business owner.

Allow 30–45 minutes per layer when done thoughtfully. Skipping ahead to Layer 3 without first completing Layers 1 and 2 will produce framework conclusions that do not survive contact with operational reality.

LAYER 1. CURRENT RELATIONSHIP

This layer establishes where the relationship sits today. It is the context that determines whether a Brand Alignment engagement is the right thing to introduce, when, and to whom. Answer from the agency's perspective; gaps in knowledge are themselves a signal worth flagging.

#	Question	What this tells us
1	What services does the agency (or agencies) currently provide for this client?	Anchors the engagement scope. Reveals where strategic vs. executional value sits today.
2	Which other agencies serve this client, and what is each of their scopes?	Maps the broader agency ecosystem. Identifies where collaboration or political friction may sit.
3	How long has the agency–client relationship existed, and what triggered it?	Tenure signals depth of trust and history. Origin story signals what the client originally hired the agency to solve.
4	Who is the day-to-day client lead, and what is their seniority and decision authority?	Determines whether strategic conversations can land with one person or require multi-stakeholder navigation.
5	Who on the client side has budget authority for strategic or analytics work beyond business-as-usual?	Identifies the actual buyer of any future Brand Alignment engagement.
6	What are the client's stated business priorities for the next 12–18 months?	Frames where the framework can attach to a business need the client is already trying to solve.
7	What does the client describe as their biggest marketing or measurement challenge today?	Surfaces the language they will recognize. The framework should be positioned in their words, not ours.
8	What does the agency team see as the biggest pain point in serving this client?	Reveals operational friction that may quietly cap what is achievable. Honest answer here matters more than diplomatic answer.
9	What recent moments — wins, near-misses, escalations — most define the current sentiment in the relationship?	Calibrates whether this is a relationship that can absorb a bold strategic proposal or one that needs a quieter on-ramp.

#	Question	What this tells us
10	Is there an upcoming inflection point — RFP, contract renewal, agency review, leadership change — in the next 12 months?	Determines timing. Inflection points are either the right moment to introduce a Brand Alignment engagement or the worst.

LAYER 2. CURRENT DATA ACCESS

This layer maps what the agency can already touch. The Data Readiness dimension of the candidate scorer is grounded here — if Layer 2 returns ten "no access" answers, the framework's measurement promises will require a data-infrastructure conversation before any strategy work begins.

#	Question	What this tells us
1	What CRM does the client use, and what level of access does the agency have (read, write, admin, none)?	Foundation for any account-level signal work. No CRM access usually means no end-to-end journey measurement.
2	What marketing automation platform is in use (Marketo, Eloqua, HubSpot, Pardot, other), and does the agency have access?	Determines whether content engagement and email behavior can be linked to named contacts.
3	What web analytics tools are in place (GA4, Adobe Analytics, other), and does the agency have view or admin access?	Pre-contact behavioral signal lives here. Anonymous-to-named stitching depends on it.
4	What ABM, intent-data, or account-identification tools are in use (6sense, Demandbase, Bombora, Clearbit, ZoomInfo)?	B2B account-level visibility hinges on this. Particularly critical for considered-purchase categories.
5	Which advertising platforms does the agency have direct credential access to (Google Ads, Meta, LinkedIn, DV360, TTD, Reddit, others)?	Establishes what paid media data can be unified into the journey view.
6	Does a Customer Data Platform exist (Segment, Tealium, mParticle, Lytics, custom build), and is the agency connected to it?	A working CDP collapses most of the technical lift on stitching. Its absence usually means engineering investment is on the critical path.
7	What is the client's current attribution model — last-touch, multi-touch, MMM, blended, none?	Reveals how the client currently believes their business works. The framework's outputs will either reinforce or challenge that model.
8	Does the agency have access to revenue or outcome data (loan closed, account opened, contract signed, MSA executed, etc.)?	Without outcome data, the Curious → Aligned and Aligned → Advocate transitions cannot be quantitatively validated.
9	What system generates the client's primary conversion event data (LOS, CTMS, e-commerce platform, POS, app database, brokerage core)?	Locates the system of record for the moment of decision. Almost always lives outside marketing tooling.

#	Question	What this tells us
10	Are there any data sharing agreements, DPAs, or compliance frameworks (HIPAA, GLBA, GDPR, CCPA, SOC2) that constrain what the agency can analyze?	Determines whether the technically possible is also legally permitted. This is the question that quietly kills more analytics projects than any other.

LAYER 3. FRAMEWORK DEEP DIVE

This layer tests the brand alignment hypothesis at the level of the client's specific buyer journey. The questions mirror the structure of the validation questions in the deep candidate evaluation reports, generalized to apply across categories. Some questions will be answered directly by the client; others will require triangulation with the agency team and downstream data exploration.

#	Question	What this tells us
1	What does the client believe is the single moment of decision — the point where the deal is won or lost?	Tests whether the client has an explicit model of the Curious → Aligned transition, or whether the framework will be introducing one.
2	What digital, behavioral, or operational signal currently marks that moment?	Surfaces whether the trigger is observable in any data, or whether reconstructing it is part of the engagement.
3	What is the typical time elapsed between first contact and conversion in this category?	Calibrates whether the framework's transitions play out in days (app-native, retail), months (mortgage, considered B2C), or years (CRO, capital projects).
4	What does the client describe as the trust trigger that moves a curious prospect to committed?	Reveals whether the client believes the trigger is a message (campaign, content) or an action (response time, demonstrated expertise, absorbed cost).
5	How is that trigger currently measured, if at all? Who owns the measurement?	Identifies the operational gap between the trigger's importance and its visibility in the data.
6	What is the structure of the buying committee — single decision-maker, dual (e.g., spouse), small team, or multi-stakeholder enterprise?	Determines whether individual-lead scoring or account-level signals are the appropriate unit of measurement.
7	For B2B or considered-purchase clients: how are pre-contact anonymous touchpoints connected to named opportunities once they enter the pipeline?	The single most common B2B data gap. Without enrichment, the Skeptic → Curious transition is invisible.
8	For app-native, transactional, or high-velocity clients: what is the equivalent of "started but did not submit" — the highest-intent non-converted behavioral segment?	The SGU analog. Identifies the operationally addressable cohort where intervention is highest leverage.

#	Question	What this tells us
9	What downstream outcome data (LTV, retention, cross-product adoption, referrals) is available to validate that an aligned customer behaves differently from a curious-only one?	Without this, the framework can describe the transition but not prove it pays back.
10	How does the client currently identify and segment advocates — repeat buyers, referrers, case study participants, social posters?	Tests whether the Aligned → Advocate transition is operationally measurable or treated as anecdotal.
11	Is there a known structural data gap — Google Business Profile organic calls, in-branch walk-ins, manual sales handoffs, off-platform referrals — that obscures the trigger moment?	Surfaces the constraint that will define what the engagement can and cannot prove. Service Experts' GBP gap is the prototype.
12	What would a proof point look like to the client — a board-ready number, a published case study, an internal narrative, a campaign performance lift?	Aligns the deliverable to the client's actual incentive. A framework that produces the wrong-shaped output for the buyer is a framework that does not get used.

NEXT STEP AFTER COMPLETION

The completed questionnaire feeds directly into the Candidate Scorer's four dimensions. Layer 1 informs Financial Impact and Emotional Impact (transaction stakes, decision frequency, identity involvement). Layer 2 grounds the Data Readiness dimension. Layer 3 informs Brand Differentiation Potential and refines all dimension scores. The synthesis produces a defensible overall score and the inputs for a full Brand Alignment Candidate Evaluation Report.