Resident Advisor (RA) — How To Use It

Get a clear read on any brand.

Resident Advisor is a workspace for fast, grounded brand analysis. Save the brands you work with, ask a question, and follow up in a conversation.

THE THREE THINGS YOU WILL USE

Thing	What it is	When to use it
Brand	A saved website plus notes, documents, and social links	Clients and prospects you will ask about more than once
Advisory	A threaded conversation about one to four sites	A specific question, pitch, or decision
Persona	A saved role	When answers should sound like a specific person, not a generic memo

TYPICAL WORKFLOW

1. Sign in to RA with your Google account.
2. Create a new brand or open an existing one.
3. Add notes, documents, and social profiles to give the brand more background.
4. Start an advisory from Home: Pick saved brands, type URLs, or combine both (up to four sites).
5. Ask your question. Optionally tailor Analysis, Audience, Persona, Depth, and Grounding settings.
6. Read the answer, then ask follow-up questions in the same thread. Select Details under the answer to see how it was compiled.
7. Return to the brand overview to see what RA knows about the brand, run Discovery Mode, or start another advisory.

NO SETUP REQUIRED

Ask your question right away. Start a new advisory by entering a website URL, and RA will automatically save the site as a private brand. Create a brand ahead of time only if you want to add notes, files, or social links before receiving your first answer.

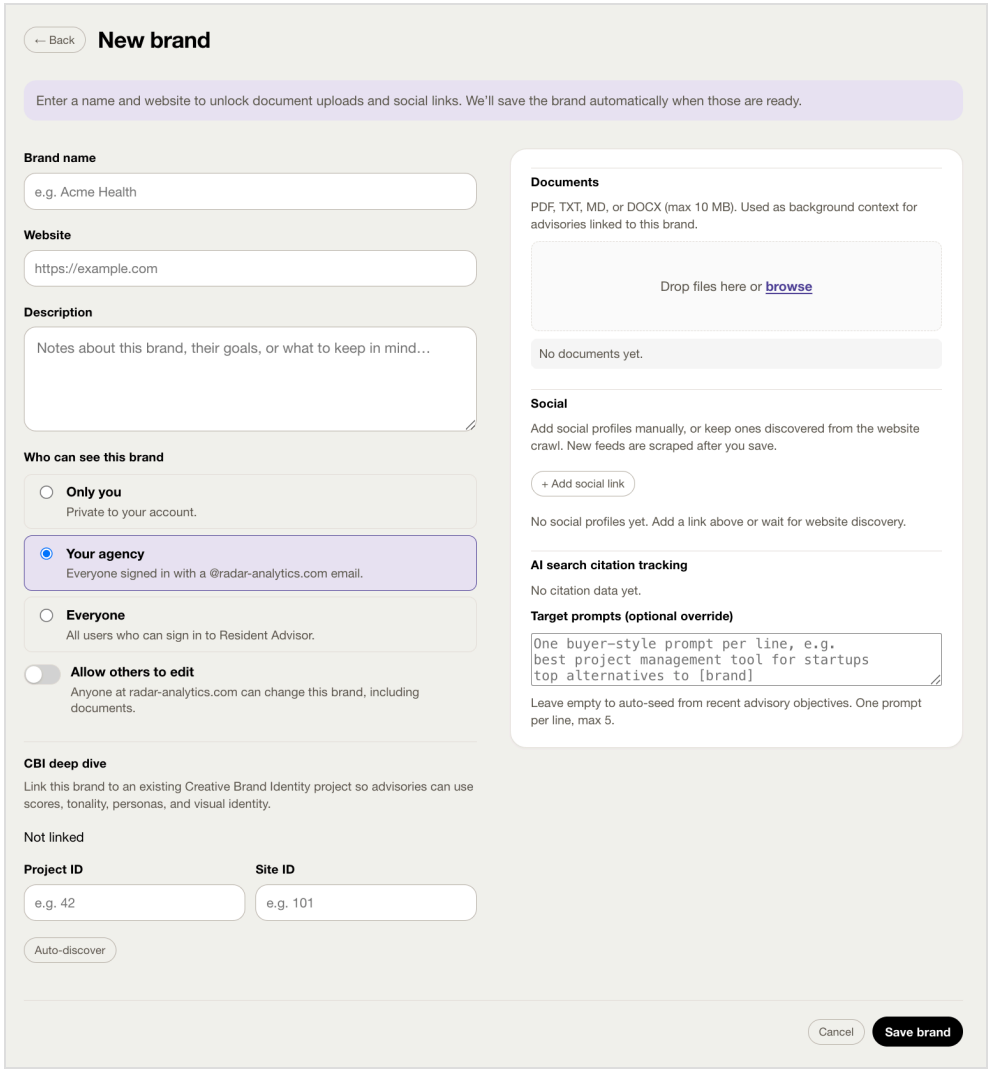
CREATE A BRAND

From Home, click "New brand" or "+ New" next to Brands in the left sidebar. Fill in:

- **Brand name:** How you refer to them (e.g., Acme Health).
- **Website:** The homepage URL. This cannot be changed later — a full re-crawl would be required. Create a new brand if the site has moved.
- **Description:** Notes about the brand, their goals, or what to keep in mind. These notes are used as background on later questions.
- **Who can see this brand:** Only you (private to your account), Your agency (everyone signed in with the same email domain), or Everyone (all Resident Advisor users).

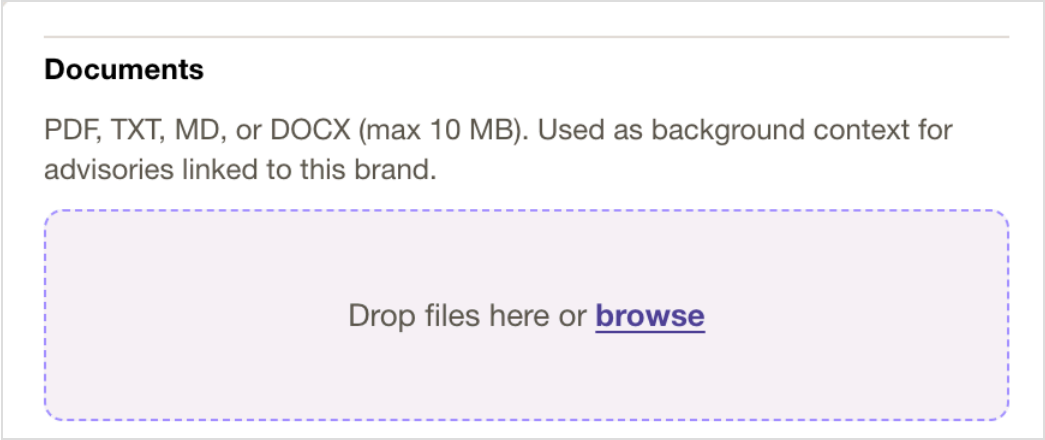
Optionally toggle "Allow others to edit" so people who can see the brand can also change it. Only the owner can change sharing settings.

Click "Save brand." The site is then crawled in the background — you do not need to stay on the page.



UPLOAD DOCUMENTS

Open the brand and click Edit. In the Documents panel, drop in relevant brand files — briefs, decks, research, internal notes, etc. — in PDF, TXT, MD, or DOCX format (each file can be up to 10 MB, with up to 20 files per brand). All uploads become searchable context for advisories linked to that brand.



WHICH SOURCE WINS?

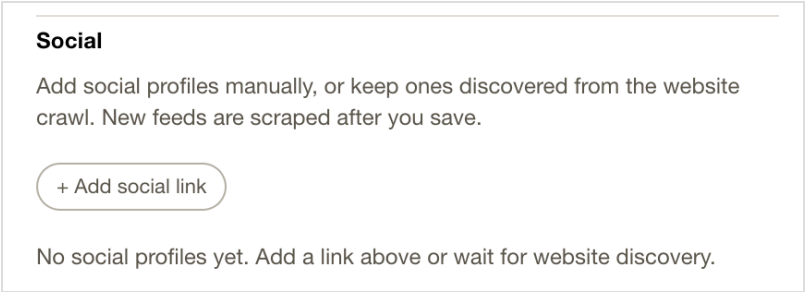
Questions about the brand's public site (positioning, design, copy): The live page text wins when sources conflict.

Questions about how MTP works with the brand (relationship, account, commercial context): Notes plus uploaded documents are treated as first-party and take priority.

CONNECT SOCIALS (BETA)

Social profiles can be added two ways:

- **Automatic:** After you save a brand, a background crawl looks for public LinkedIn, Instagram, TikTok, X, and YouTube links on the site and samples a few recent posts. Note that this is best effort as some platforms block sampling.
- **Manual:** When editing abrand, click "+ Add social link," choose the platform, paste the handle or URL, and save. New feeds are scraped after you save.



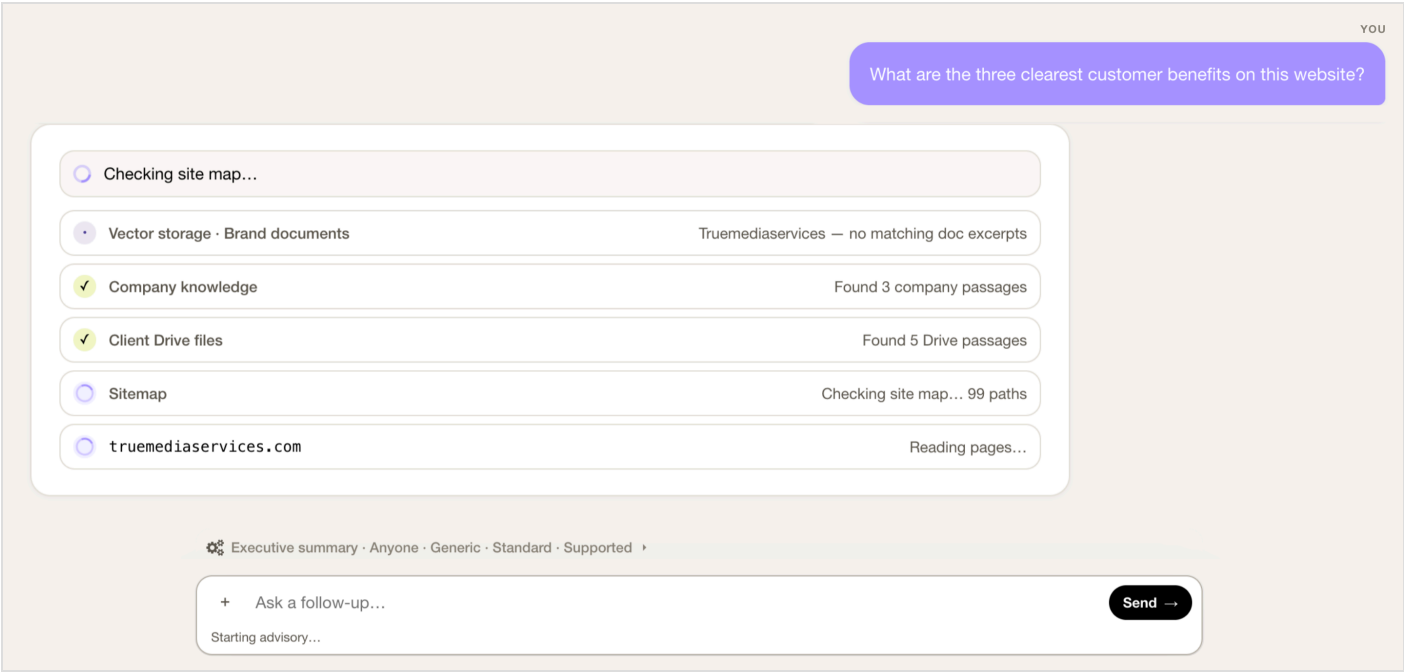
From the brand overview screen, you'll see which social profiles are attached and whether samples came back. Social content adds context about the brand's public voice, but never overrides what's on the brand's live site.

ASK A GOOD FIRST QUESTION

From Home, under New advisory: Select saved brands and/or type website URLs (up to four). Click Continue, then type the question in the composer. For example:

- “How does this brand talk about itself vs. [second URL]?”
- “What would you change on the homepage for a first-time visitor?”
- “Summarize their offer, proof, and calls to action.”

While the answer is generating you will see live progress. Stay in the thread and ask follow-ups: “Make that a one-paragraph exec brief,” “Rewrite for a founder,” “What is missing from the proof?”



TAILOR THE TURN

Click the gear icon above the chat composer. These settings shape the answer you'll receive —they do not change which brand you asked about.

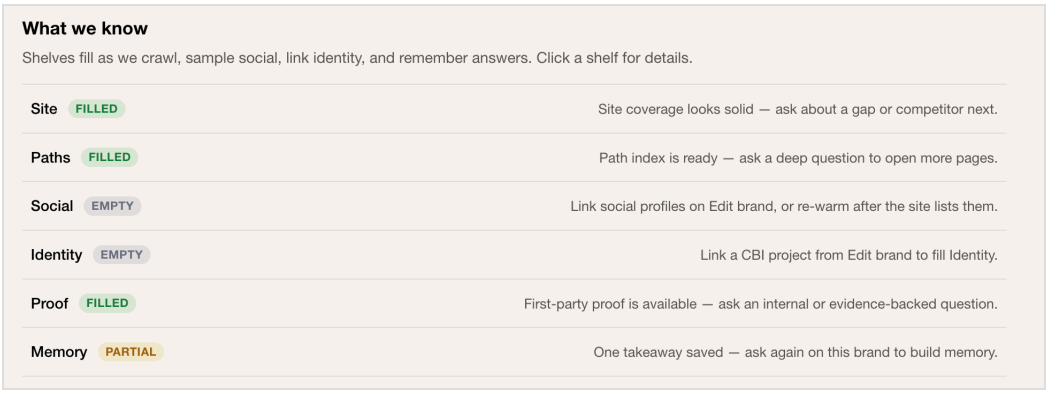
Control	What it does	Default
Analysis	Shape of the write-up: exec summary, side-by-side, brand & design, SEO, marketing, and more	Smart default — exec summary for one site, side-by-side for two or more
Audience	Who the writing is for; changes emphasis and tone, not which pages are crawled	Anyone
Persona	Optional saved role; writes as that person	Generic (Audience only)
Depth	How much of the site to read: Quick, Standard, or Deep	Standard
Grounding	How tightly claims must be backed by retrieved sources	Supported

Click any tailor label for a short explanation of every option.

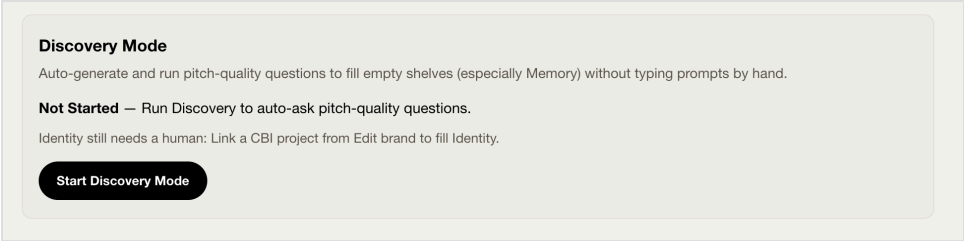
BRAND OVERVIEW: “WHAT WE KNOW”

Click on a brand to open its overview:

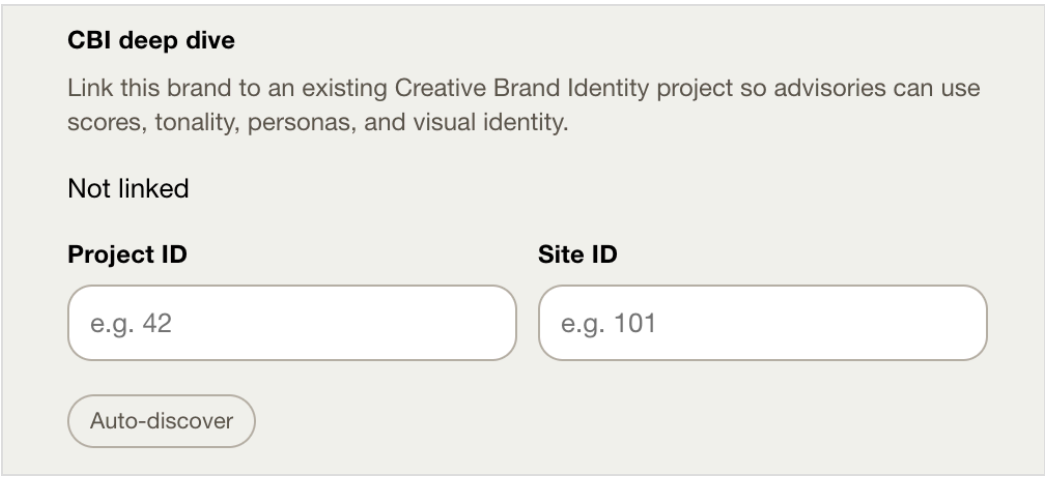
- **Shelves:** Site, Paths, Social, Identity, Proof, Memory. Each is filled, partial, or empty, with a plain-language next action. Click a shelf for details.



- **Discovery Mode:** Editors can auto-run a set of preset questions that cover the essentials of a brand and help fill empty or partial shelves. Asking your own question during Discovery Mode will pause the auto-run. To restart it, click Resume from the brand overview.



- **CBI deep dive:** Edit a brand and link an existing Creative Brand Identity project, or use Auto-discover, so advisories can pull on CBI scores, tonality, personas, and visual identity.



- **Advisories:** Conversations that include this brand, most recent first. Under each answer, a summary line shows a confidence score and how many pages, files, and other sources the answer used. Select Details to see the full list.

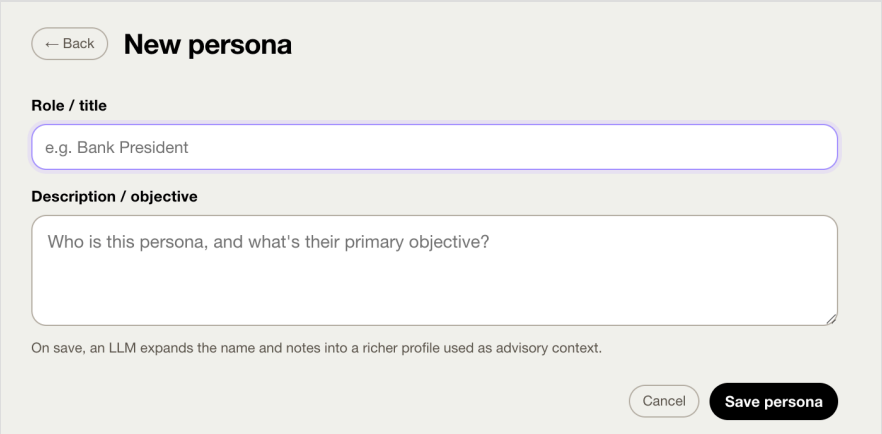


MEMORY

RA's memory is saved to the brand (i.e., its website), not just your account. A short takeaway is created from each answer, and then RA references those takeaways as background when answering later questions about the brand. On public brands, advisory titles and dated takeaways may be visible to others, but uploaded files stay with the owner.

PERSONAS

In the left sidebar under Personas, click "+ New." Enter a role or title and a short description of who this person is and what they want to achieve. Click Save and RA will turn your entry into a fuller profile. To get an answer written from the person's point of view, select the persona in the composer before asking a question.



You can save up to 20 personas. Use Audience for “write for a marketer”; use Persona when you need a named role with a specific stance.

PRACTICAL TIPS

- ✓ **Ask your real question first, not a test prompt.** Each answer adds a takeaway to the brand's memory, which later questions build on.
- ✓ **Treat prospect and client brands the same.** Both use the same steps.
- ✓ **Four sites max per advisory.** Compare the client or prospect brand's site to up to three competitor sites.
- ✓ **Check the site URL before you save.** A brand's website can't be changed after it's created.
- ✓ **Stay in one advisory as your thinking evolves.** Follow-ups keep context; a new advisory is for an entirely different question or a new set of sites.
- ✓ **Sharing is set at the brand — not advisory — level.** Notes and uploads on a private brand stay private, no matter which advisory you're in.

FAQS

Do I have to create a brand before I ask a question?

No. Start a new advisory, type in the brand's URL, and ask your question — a private brand is created for that website automatically. Create a brand first when you already have notes, files, or social links you want in the first answer.

What file types can I upload, and who can see them?

PDF, TXT, Markdown, and DOCX, up to 10 MB each and 20 files per brand. Visibility follows the brand: private, agency, or everyone. Raw uploads stay with the owner even when a public brand shares high-level takeaways. Only editors can upload or delete files.

Why didn't social posts show up after I added a link?

The social connections feature is currently in beta and sampling public posts is best effort. YouTube is usually the most reliable; other platforms are sometimes blocked or empty (though the brand still stores the profile URL). Try saving again after you add a link, then check the status on the brand overview.

Can I change a brand's website later?

No. The website is fixed so the crawl and knowledge stay tied to one canonical site. If the brand moved domains, create a new brand with the new URL.

What is the difference between Audience and Persona?

Audience is who the writing is for — founder, marketer, designer. Persona is an optional saved role that writes as that person. Leave Persona on Generic unless you need a specific voice.

When should I start a new advisory vs. keep following up?

Follow up in the same advisory to refine, rephrase, compare a new angle on the same sites, or change tailor settings. Start a new advisory for a different decision, a different set of sites, or when you want a clean thread. Brand knowledge — notes, docs, social, memory — carries across advisories for that domain.

Who can edit a brand?

That depends on sharing. If you can see a brand but are not an editor, you can still use it when creating a new advisory. Only the owner, or someone the owner allowed to edit, can change notes, docs, social, and CBI. Only the owner can change who can see or delete the brand.

How reliable are the answers?

Answers are grounded in retrieved sources: the live site, brand notes, documents, social samples, memory, and CBI when linked. Supported grounding — the default — stays with the evidence and says when something is missing. Switch to Strict if you need claims cited and gaps called out instead of filled. Switch to Flexible if labeled inference is useful.