

# **MASB Standards Project**

## **Brand Evaluation Standards (BES) ISO Standard 20671 - Marketers' Golden Ticket**

**Dave Stewart, Loyola Marymount University  
MAF Trustee/MASB Chair**

**August 2018  
Boston**



**Marketing Accountability Standards Board  
of the Marketing Accountability Foundation**

# BES Project

Project	Brand Evaluation Standards (BES) (Stewart & Willard)	
Issue Addressed	ISO has a Brand Evaluation Standards Project in the works	<b>Strategy</b> Get BIV Standards recognized globally by participating in ISO development of Brand Evaluation Standards
Project Objective	Collaborate w/ANSI & ISO to Influence the BEval Standards	
Expected Outcome	MASB BIV Standards recognized by ISO and applied across the world	
When	2018-2019	

# Brand Evaluation Definition

**Brand evaluation refers to the measurement of the value of a brand using relevant indicators that assess the impact of the brand on customers/users. Brand evaluation includes both non-monetary and monetary considerations.**

**Brand evaluation and brand valuation are related concepts and synergistic with each other. Brand valuation is narrower and includes only monetary considerations. While brand valuation is defined from the brand owning entity's point of view, brand evaluation is defined from the point-of-view of all stakeholders.**

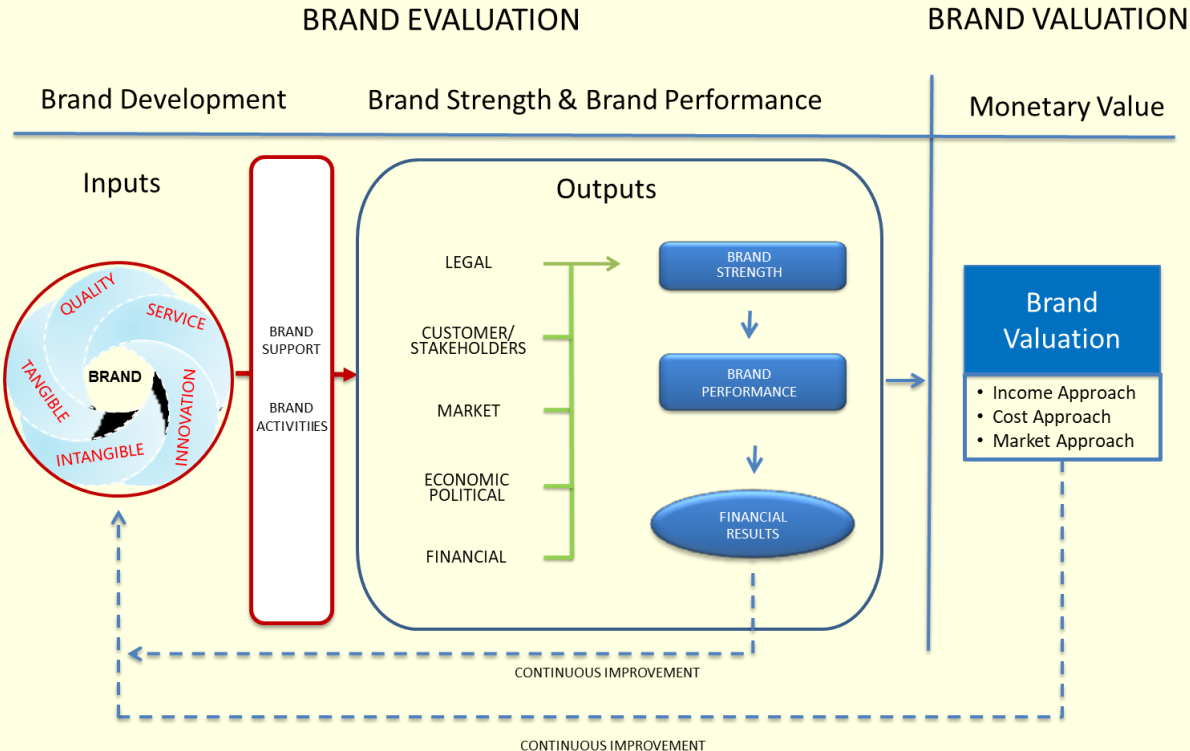
Source: [www.marketing-dictionary.org](http://www.marketing-dictionary.org)

# What is ISO 20671 – Brand Evaluation?

- New meta-standard which sets the framework and set of principles for rigorous, regular brand evaluations (valuations)
- Covers all brand types
- Systemic review of marketing metrics, internal financials, environmental factors, and processes
- Referred to as marketing's 'Golden Ticket' – opens dialog with corporate leadership on the the contribution of branding to enterprise value
- Global in reach – created through participation of national standard boards coordinated by ISO Technical Committee 289
- Works in parallel with ISO 10668 – Brand Valuation

# 'Meta-Standard' Framework

## ISO DIS:20671 BRAND EVALUATION FRAMEWORK



# ISO Background



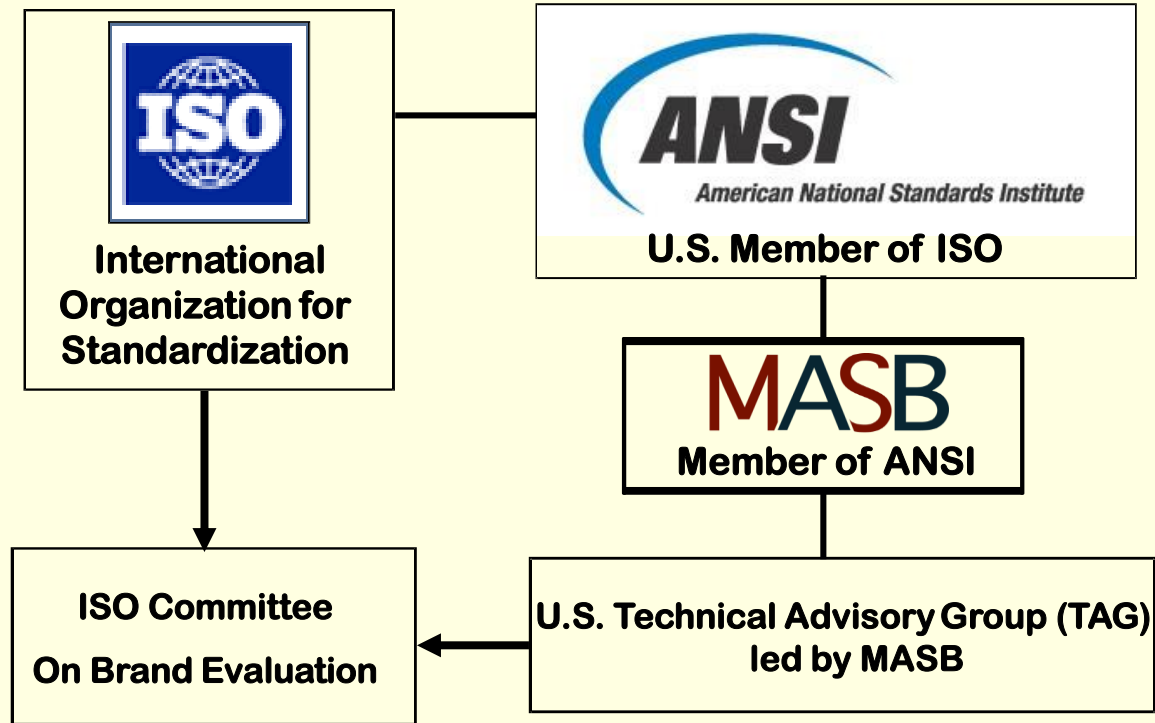
## International Organization for Standardization

Founded in 1947, ISO's scope covers any and all possible standardization subjects not addressed by IEC or ITU.

The ISO is a non-government organization and network of the national standards institutes of countries, one member per country, with the ISO Central Secretariat located in Geneva, Switzerland.

ISO has 164 member countries. The ISO member organization from each country is the organization that best represents that country's national standards system. In many cases, especially with developing countries, the ISO member is a government agency.

# Summary of Organizational Relationships



# ISO TC-289 Brand Evaluation Participants

## Secretariat

- China (SAC)

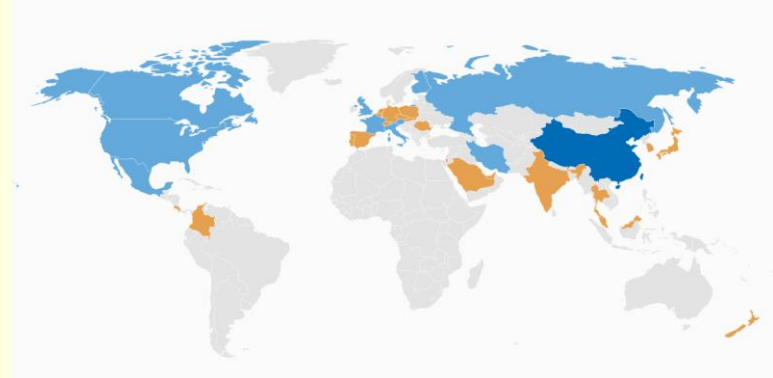
## Participating Countries (12)

- Austria (ASI)
- Barbados (BNSI)
- Canada (SCC)
- China (SAC)
- Finland (SFS)
- France (AFNOR)
- Italy (UNI)
- Iran, Islamic Republic of
- Mexico (DGN)
- Russian Federation (GOST R)
- United Kingdom (BSI)
- United States (ANSI/MASB)

## Observing Countries (23)

- Bahrain (BSMD)
- Belgium (NBN)
- Colombia (ICONTEC)

- Costa Rica (INTECO)
- Czech Republic (UNMZ)
- Germany
- India (BIS)
- Israel (SII)
- Japan (JISC)
- Korea, Republic of (KATS)
- Malaysia (DSM)
- Malta (MCCAA)
- Netherlands (NEN)
- New Zealand (SNZ)
- Poland (PKN)
- Portugal (IPQ)
- Romania
- Saudi Arabia (SASO)
- Singapore (SPRING SG)
- Slovakia (SOSMT)
- Spain (AENOR)
- Switzerland (SNV)
- Thailand (TISI)
- United Arab Emirates (ESMA)





# Where to find ISO-20671

The screenshot displays the ISO Online Browsing Platform (OBP) interface. At the top, the header includes the ISO logo, the text 'Online Browsing Platform (OBP)', and navigation links for 'Sign in', 'Language', 'Help', and 'Search'. Below the header, a search bar contains the text 'ISO/DIS 20671(en)'. The main content area is titled 'ISO/DIS 20671(en) Brand evaluation — Principles and fundamentals'. On the left, a 'Table of contents' sidebar lists various sections, with 'Foreword' highlighted. The main content area shows the 'Foreword' section, which includes text about the ISO organization, the document's purpose, and references to other ISO documents. The 'Introduction' section is also visible, starting with '0.1 General'.

Online Browsing Platform (OBP)

ISO

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**Foreword**

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for whom a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2. [www.iso.org/directives](http://www.iso.org/directives)

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received. [www.iso.org/patents](http://www.iso.org/patents)

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation on the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the WTO principles in the Technical Barriers to Trade (TBT) see the following URL: [Foreword - Supplementary information](#)

The committee responsible for this document is ISO/TC 289.

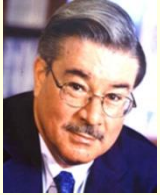
**Introduction**

**0.1 General**

Brands are one of the most valuable yet least understood of assets.

A brand identifies an entity's goods, services or itself as distinct from what is offered by another entity. A brand can thus be connected

# MASB Member Reps Who Participated on BES



**Dave Stewart**  
Loyola  
Marymount



**John Willard**  
Willard  
Enterprises



**Edgar Baum**  
Strata Insights



**Greg Silverman**  
Concentric



**Dejan Duzevik**  
Concentric



**Bobby Calder**  
Northwestern  
Kellogg



**Frank Findley**  
MSW-ARS &  
MASB



**Tony Pace**  
MASB

**MASB members also played roles on participating country delegations (CAN, UK, US) and TC-289 Leadership**

# Launch of Global Standard - ISO 20671



# Coordinated Global Media



Courtesy of MASB

## #Brand #Evaluation is the Golden Ticket

Published on June 12, 2018



**Patricia McQuillan, MBA** + Follow  
President & Founder of Brand Matters, Global Branding Expert, Thought Leader, Keynote Speaker.  
15 articles



The new #ISO standard for Brand Evaluation is the golden ticket for organizations as it provides an integrated reporting process for the measurement of brand value. It represents a commitment to recognize brands as valued economic assets. Learn more with the preview of Brand Valuation ISO 20671 now available on the [ISO platform](#).

@BrandMattersInc @ISOStandards @theMASB1.

<https://bit.ly/2JLcYSu>

# MASB



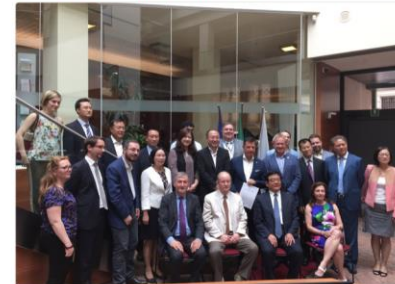
**European Brand Institute** @EBrandInstitute · May 9

Gerhard Hrebicek, President European Brand Institute giving a speech on the occasion of #ChinaBrandEvaluation press conference in Shanghai today together with Minister Chen Gang und Liu Pingjun, President CCBD. #ChinaBrandDay



**Brand Finance** @BrandFinance · Jun 14

Delighted to have helped craft the new #ISO20671 standard for Brand Evaluation, a robust new international standard that provides framework for regular evaluation of #brand value. Thanks @theMASB1 @NorthwesternU @Stratalsights @cerebrigriffiti @BrandMattersInc & TC289 members!



**MASB** @theMASB1 · Jun 11

MASB members Bobby Calder & David Haigh with Gerhard Hrebicek @EBrandInstitute & other TC289 members present unanimously approved ISO 20671 Brand Evaluation standard at plenary meeting in Milan Italy. [themasb.org/new-iso-brand-...](https://themasb.org/new-iso-brand-...) @isostandards @ansidotorg #marketing



David Haigh and Claudio Barella



# Next step is creation of ‘Guidelines’

- **MASB/ANSI proposed a new working item for TC-289 working group**
- **Complements ISO 20671 framework through a “publicly available specification”**
- **Akin to the BIV principles, it will provide practical, detailed guidelines for conducting the reviews**
- **MASB will host the 2019 ISO TC-289 Plenary in New York June 24-26**
- **Creation of the guidelines will be will be primary working group item in that session**



# Who is the lucky person with the Golden Ticket?

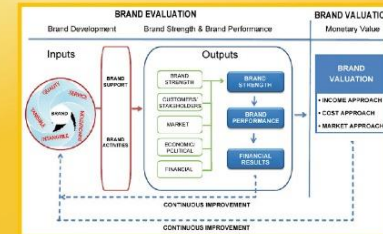


Trick question...we all are!

With the new, unanimously approved global standard for brand evaluation, ISO 20671, brand owners now have an independently assessed and universally accepted approach to monitoring brands.

*“Accountable marketers will love ISO 20671 because to be in compliance, they will have to value their brands regularly. It’s a Golden Ticket for marketers.”*

– MASB President/CEO Tony Pace



ISO 20671 BRAND EVALUATION FRAMEWORK

To help facilitate adoption of the standard, MASB is offering virtual **debriefing sessions** for brand owners. To request one, contact [info@themasb.org](mailto:info@themasb.org).

# Discussion

- **To whom does this matter?**
  - Not a consumer oriented standard.
  - What other stakeholders besides brand owners?
- **How should certification be conducted?**
  - Who should do them?
  - What form should they take?
  - What role should MASB play?
- **How can we best promulgate ISO 20671?**

# BES Team Members

## Team Leaders



**Dave Stewart**  
LMU & TAG Chair



**John Willard**  
TAG Vice-Chair

## Team Heroes



**Edgar Baum**  
Strata Insights



**Bobby Calder**  
Northwestern

## Staff



**Frank Findley**  
MASB ED  
Sponsor & TAG Admin



**Tony Pace**  
MAF/MASB



**Erich Decker-Hoppen**  
Communication



**Karen Crusco**  
Executive Assistant  
Admin



**Thank-you!**



**Marketing Accountability Standards Board  
of the Marketing Accountability Foundation**