DECISION TOOL

Rebrand or Refresh? The B2B Decision Tool

BrandExtract

Insight to Impact



How to use this tool

This tool helps B2B leadership teams decide whether they need a brand refresh, a full rebrand, or neither, before any budget is committed. It takes about 30 minutes and works best as a group exercise.

A QUICK DEFINITION

A **refresh** updates how your brand looks and sounds while the strategy stays put. A **rebrand** changes what the brand stands for, who it serves, how it is structured, or what it is called.

Running the exercise

1. **Get the right people in the room.** Include the CEO, the heads of sales and marketing, and at least one leader closest to customers. In a PE-backed or post-merger company, include a representative from the sponsor or the integration team.

2. **Score each person separately first.** Have everyone complete Part 1 on their own, then compare. Where scores diverge, you have found the conversation you need to have.

3. **Be honest, not aspirational.** Score where the company is today, not where the strategic plan says it will be.

4. **Treat the result as a starting point.** The score tells you which kind of work to investigate. Customer and employee research tells you exactly what to change.

Has your strategy changed?

Score each statement 0 (not true), 1 (partly true), or 2 (clearly true). Add up each section separately.

A1	We have changed, or will soon change, who we serve, what we sell, or how we make money.	0 1 2
A2	Our ownership or structure has changed through a merger, acquisition, carve-out, or PE platform build.	0 1 2
A3	New leadership has arrived with a mandate that differs from the previous strategy.	0 1 2
A4	Our name or promise limits the markets, services, or geographies we want to enter.	0 1 2
A5	Customers can't easily tell how our businesses, divisions, or sub-brands relate to each other.	0 1 2
A6	Our current brand would confuse customers of the company we are becoming.	0 1 2

Section A total / 12

Has your expression fallen behind?

Score each statement 0 (not true), 1 (partly true), or 2 (clearly true).

B1	Our visual identity looks older than the company we have become.	0 1 2
B2	Our touchpoints look and sound inconsistent across locations, teams, or offerings.	0 1 2
B3	Our sales team rewrites or avoids official brand materials.	0 1 2
B4	Our website and content fall short of how buyers research today, including through AI answer engines.	0 1 2
B5	Customers and employees describe us differently than we describe ourselves.	0 1 2
B6	We can't explain what makes us different in one clear sentence.	0 1 2

Section B total / 12

What is worth keeping?

Answer these before you read your result. They determine how much of your current brand you should carry forward.

Which parts of our brand (name, color, symbol, phrase) do customers recognize without prompting?

What do our most loyal customers say we do better than anyone?

What would our employees be upset to lose?

PART 2

Reading your result

Find where your two section totals meet. A score of **6 or higher** in a section means that dimension needs real work.

	Section B under 6 (expression is holding up)	**Section B 6 or higher** (expression has fallen behind)
Section A 6 or higher (strategy has changed)	**Rebrand, strategy first.** The brand may look fine, but it describes a company you no longer are. Start with positioning and architecture; design follows.	**Full rebrand.** Both what you stand for and how you show up need to change. Use Section C to protect the equity that still works.
Section A under 6 (strategy is intact)	**Neither, for now.** Your brand is probably not the problem. Look at sales enablement, product, pricing, or operations before spending on identity.	**Refresh.** Keep your name and most recognizable assets. Modernize the identity, messaging, and digital experience around them.

Watch the borderline scores. A Section A score of 4 or 5 often signals a strategy that is shifting but not settled. Resolve the strategy before committing to a rebrand, or you risk rebranding twice.

Watch the disagreements. If one leader scores Section A at 10 and another at 2, the team doesn't share a view of where the company is headed. That gap is a bigger risk than any logo.

PART 3

Situation checks

Three situations drive most B2B brand decisions. If one applies to you, work through its questions after scoring.

After a merger or acquisition

McKinsey recommends four questions to ground the brand decision:

- Does brand matter in customers' purchasing decisions, or for internal reasons?
- Do the companies' target customer segments overlap?
- How different are the two brands' equities in the overlapping segments?
- How significant are customers' switching costs?

The answers point to one of five outcomes: keep brands independent, combine them, create an umbrella brand, select one legacy brand, or create an entirely new one. Only 40% of companies say they take a fact-based approach to this decision, so the research is where most of the advantage lies.

During a PE platform build

- Will more acquisitions follow? If so, choose an architecture that can absorb them without another rebrand.
- Which acquired names carry real customer loyalty or referral value?
- What story does the platform need to tell the next buyer at exit?
- Do employees of acquired companies know what they are now part of?

After a leadership change

- Is the new leader changing the strategy, or just the style?
- Was the company performing well or poorly before the transition? McKinsey found bold moves paid off at underperforming companies, while replacing most of the top team at healthy ones destroyed value.
- Can the new direction be explained to a loyal customer in two sentences?
- Is the timeline driven by the business or by the desire to make an early mark?

If the strategy is changing, score it in Section A. If only the style is, the answer is almost always a refresh.

PART 4

Frequently asked questions

How much does a rebrand cost?

It depends far more on scope than on design. A refresh typically covers identity updates, messaging, and a website. A full rebrand involves research, positioning, naming, and trademark clearance, followed by a rollout that can affect signage, vehicles, uniforms, contracts, sales tools, and every digital property. For asset-heavy B2B companies, rollout is often where the real budget lives. Price the change you need, not the one that looks best in a pitch.

How long does a rebrand take?

A focused refresh can move in a matter of months. A rebrand takes longer because alignment, research, and rollout can't be rushed. In M&A, McKinsey found that 65% of companies complete the brand transition within 12 months of close, 80% within 18 months, and 75% phase it in gradually rather than all at once. Some take longer by design: when Avianca and TACA merged, the company waited more than three years to put a new face on the combined airline.

Why do companies rebrand?

Most often, because the business changed. Wharton marketing professor Patti Williams cites three typical triggers: a merger or acquisition that requires a new corporate identity, a shift in strategic direction, and a name that no longer fits.

Should a new CEO rebrand the company?

Only if the strategy is changing. A new leader is a reason to review the brand, not a reason to replace it. If customers, offerings, and promise are staying put, a refresh usually signals the new chapter better than a new name.

Will a rebrand hurt our search and AI visibility?

It can if you treat a name change as a design launch. Forrester notes that marketers now need to drive visibility in AI answer engines, not just traffic from search. Plan redirects, update every profile and listing, and publish clear content that connects your old name to your new one so buyers and AI tools can follow the change.

Can we rebrand in phases?

Yes, and most companies do. Phasing lets customers transfer loyalty gradually and lets you prioritize the touchpoints that matter most. The risk is a long, messy middle where old and new brands compete, so set an end date and hold to it.

What if the real problem is our reputation?

Fix the operations first. As Williams puts it, a new brand name doesn't change what is going on inside an organization. A rebrand launched to escape a reputation problem usually inherits it.

Your next step

A score tells you which kind of work to investigate. It can't tell you what your customers still value, what your employees believe, or which parts of your brand are quietly doing the heavy lifting. That takes research.

BrandExtract helps B2B companies navigate mergers, platform builds, leadership transitions, and strategic transformations. Make this call with evidence, not instinct.

Let’s Talk_

If your scores surprised you, or your leadership team didn't agree, let's talk.

Contact Us

Sources

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Read the full article

Rebrand or Refresh? How to Make the Call Before You Waste the Budget