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METHODOLOGICAL GUIDELINES
for the implementation of practical tasks in the course
BRANDING
for students of all programs for all forms of education

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Introduction

Constant market development and changing requirements for the organization and implementation of entrepreneurial activity necessitate the use of marketing solutions and unconventional approaches grounded in an in-depth understanding of the market and consumer needs.

Marketing, as a professional field focused on promoting goods and services in the marketplace, is widely practiced. Modern marketing activities cannot be imagined without branding. Branding is the process of building, developing, and managing a brand. One of the most successful outcomes of branding is achieved when consumers begin to perceive the brand as a distinct category (or when the brand becomes strongly associated with a unique category in consumers' minds).

The purpose of teaching the discipline "Branding" is to master the system and methods of brand formation within the marketing system, as well as the content and functions of brand promotion policy from the perspective of the theory of interaction among market participants. The knowledge and skills acquired in studying the discipline will help students prepare materials for enterprises, develop product brands, and evaluate advertising messages and mass communications in entrepreneurial practice.

The purpose of the practical classes is to develop and consolidate theoretical knowledge, master methods, and acquire practical skills in applying branding tools to improve enterprise performance in modern market conditions.

These methodological guidelines provide for completing standard exercises and tasks and addressing the most common branding problems faced by both small and large enterprises.

Practical lesson 1

Topic: Values of TM

Aim: to identify and analyze brand (TM) values (functional, emotional, social), build a brand value pyramid, and justify how TM values influence brand positioning and (potentially) consumer loyalty.

Questions to prepare for the lesson:

1. Basic concepts: brand values, trademark, brand identity.
2. The role and importance of brand values in marketing.
3. Pyramid of brand values (core, emotional, social).

Tasks:

1. Using the principles of scientific research and analysis of existing definitions in the literature of the concepts of "brand value", "brand identity", "branding", "trademark":

2. Conduct a critical analysis of each of them. Completing this task involves working with literary sources of foreign and domestic authors. It is necessary to study at least 10 primary sources. References to primary sources are mandatory.

3. Identify the main characteristics of the brand values. The definitions found must be grouped according to some criterion, which is determined by the student independently. Each of the identified characteristics is a necessary but not sufficient condition for successful branding of the brand. It is important to determine what brand values distinguish it from an ordinary brand.

4. Provide your own definition of brand values. In a practical session in case teams (3-4 students), students summarize the conclusions they have drawn independently and the definitions they have provided. Each case team, based on the work of the participants, forms a collective definition of "brand values" and makes a presentation. A discussion is held between the case teams to form generalized definitions of the main concepts of brand value.

5. Give examples of brand values and comment on them.

Control questions:

1. *What is meant by TM/brand values, and how do functional, emotional, and social values differ?*
2. *For a chosen brand, what are two examples of functional values, and how do they reduce customer effort or risk?*
3. *For the same brand, what are two examples of emotional values, and which touchpoints mainly create these emotions?*
4. *What are two social values of the brand, and how do they influence identity, belonging, or status in consumer choice?*

5. *How can the identified TM values be structured into a brand value pyramid, and how do the top-level values support the brand's positioning?*

Practical lesson 2

Topic: Classification of Brands by Various Characteristics

Aim: to develop the ability to systematically classify brands using different scientific criteria, critically evaluate existing brand classification approaches in academic and professional literature, and justify how each classification criterion influences brand strategy decisions (positioning, target segments, geographic expansion, ownership/architecture choices, and value creation).

Questions to prepare for the lesson:

1. Basic concepts: brand, brand classification.
2. Signs of brand classification: industry, geographic, and segmentation.
3. Modern approaches to brand classification in the context of globalization.

Tasks:

1. Using the principles of scientific research and analysis of existing brand classifications in the literature, such as “global brands”, “national brands”, “personal brands”:
 2. Choose one real brand (Ukrainian or global). Classify it using at least 4 lecture-based criteria:
 - by object (product / service / corporate / personal / event / place);
 - by territorial coverage (local / regional / national / international / global);
 - by competitive position (leader / strong player / challenger / niche / small);
 - by price–quality level (economy / mid-range / premium).

Output: a one-page “classification passport” with short justification (1–2 sentences per criterion) and 1 competitor for comparison.

3. Take two competing brands in one category (for example: two banks, two cosmetic brands, two airlines, two food brands, etc.). Explain how each brand makes customer choice easier and reduces uncertainty through reputation, communication, consistency, or other trust signals. Analyze how the brands differentiate themselves beyond product features by creating specific associations such as innovation, prestige, care, sustainability, or local identity. Compare their price power and discuss which brand can charge more or rely less on discounts, explaining how perceived value, emotional meaning, and trust reduce price sensitivity. Examine loyalty and demand stability by describing which brand is

more likely to generate repeat purchase and why, referring to experience, emotional connection, or alignment with customer values. Finally, evaluate which brand is in a stronger strategic position for launching new products, working with partners, or surviving a crisis. Conclude by stating which brand has stronger brand-based competitive advantages and justify your decision.

4. Choose one brand you personally use or know well. Analyze how this brand performs the following functions (Table 2.1).

If this brand disappeared tomorrow, what exactly would customers lose besides the product/service itself?

Table 2.1 – Analysis of Brand

Brand Function	How this brand performs it in practice
Identification (recognition)	Name, logo, colors, packaging, design
Risk reduction	Guarantees, reputation, reviews, consistency
Emotional/mental reassurance	Feelings the brand creates (confidence, comfort, status, belonging)
Social function	What does using this brand say about the user?
Value/meaning function	Does it stand for sustainability, innovation, tradition, care, etc.?
Discipline function for the company	How must the company behave to protect the brand?
Loyalty & niche formation	Who are the typical loyal users? Why do they stay?

Control questions:

1. *What is brand classification, and why is it useful for brand analysis and strategic brand management?*
2. *Which classification criteria are most commonly used in the lecture (by object, territorial coverage, competitive position/market share, price–quality level, life-cycle stage), and what does each criterion explain?*
3. *How do “global,” “international,” “national,” and “regional/local” brands differ, and what managerial challenges increase as territorial coverage expands?*
4. *How do branding priorities differ for a market leader, a strong player, a challenger, a niche brand, and a small brand?*
5. *Why do product brands and service brands require different branding emphasis, and which touchpoints are most critical for service brands before purchase?*
6. *How does choosing different classification criteria influence brand strategy decisions (positioning, communications intensity, distribution focus, and risk management)?*

Practical lesson 3

Topic: Development of Brand Identity and Individuality

Aim: to develop the ability to define, design, and justify a coherent brand identity and individuality for a chosen brand by translating strategic decisions (target audience, positioning, and value proposition) into clear identity elements (brand essence, personality, attributes, and communication style) that ensure consistency across key touchpoints.

Questions to prepare for the lesson:

1. Key concepts: brand identity, brand personality.
2. The process of developing a brand identity.
3. The role of brand identity in creating an emotional connection with consumers.

Tasks:

1. Conduct an analysis of literary sources regarding the main approaches to creating brand identity and individuality. Completing this task involves working with both domestic and foreign sources. It is necessary to study at least 10 sources, citing relevant references.
2. Identify the key elements of brand identity (e.g. name, logo, colors, fonts, tone of communication, brand promise) and their impact on consumer perception. The elements found should be organized by importance to build a unique brand identity.
3. Develop a brand personality. Propose a personality for a fictional or real brand based on the following characteristics:
 - personality (properties that reflect the "character" of the brand, for example: fun, serious, elite).
 - tone of communication (formal, friendly, playful).
 - cultural values of the brand (what is important for the brand in terms of social responsibility, ethics, etc.).
4. Conduct a comparative analysis of the identity and individuality of various well-known brands. In a practical session, students, working in case teams, analyze and compare brands such as Apple, Nike, Starbucks, or others based on the main elements of identity and individuality.
5. Prepare a presentation with their findings. Each team presents the developed brand personality and explains how the brand identity affects its communication with the audience and its positioning in the market.

Control questions:

1. *What is brand identity, and how does it differ from brand image (market perception)?*

2. *What are the key components of brand identity (brand essence, values, personality, attributes), and what is the role of each component?*
3. *How does brand positioning influence the choice of identity elements (tone of voice, visual cues, messaging priorities)?*
4. *What is brand personality, and how can you describe it using consistent traits that support differentiation?*
5. *Which brand touchpoints most strongly communicate identity, and how can inconsistency across touchpoints damage trust?*
6. *What should be included in a basic brand book to preserve brand individuality and ensure consistent use of identity elements?*

Practical lesson 4

Topic: Research of Brand Portfolios. Definition of Brand Management Strategies

Aim: to develop the ability to analyze a company's brand portfolio (structure, roles, and relationships among brands), assess strategic fit and risks within the portfolio, and justify appropriate brand management strategies (e.g., brand extension, rebranding, co-branding, licensing/franchising) based on market position, target segments, and long-term brand equity goals.

Questions to prepare for the lesson:

1. Key concepts: brand portfolio, brand management.
2. Types of brand portfolios: mono-brand, multi-brand, corporate brand.
3. Brand portfolio management strategies: brand extension, brand licensing, and co-branding.

Tasks:

1. Research on brand portfolios of large corporations (e.g., Procter & Gamble, Unilever, LVMH):

Analyze how different companies structure their brand portfolios.

Identify the key brand types in the portfolio (e.g., core, subsidiary, regional).

2. Evaluation of brand management strategies:

Conduct a critical analysis of key brand management strategies, such as:

Umbrella brand strategy branding: when one brand is used for different products.

Multibranding strategy: when a company creates multiple brands within the same market segment.

Co-branding: the collaboration of two or more brands to create a joint product.

3. Developing a brand management strategy for a company from a real or fictional market:

Students must identify the company's brand portfolio and develop an appropriate strategy for managing them, taking into account:

Brand positioning.

Expansion of the product range.

Supporting strong brands and possibly removing weak brands from the market.

4. Analysis of successful examples of brand portfolio management:

Students should research real-life cases of successful brand management, such as product line extensions for Coca-Cola, Nestlé, or Virgin.

Assess how each company uses its brand portfolio to achieve competitive advantages in the market.

5. Presentation of research and strategies:

Each case team prepares a presentation with its analysis of the brand portfolio and recommendations for brand management strategies.

Control questions:

1. *What is a brand portfolio, and how is it different from a product assortment?*

2. *What is brand architecture, and how do umbrella/master brands, sub-brands, and endorsed brands differ in their roles?*

3. *Why do companies maintain multiple brands instead of one master brand (segmentation, risk isolation, channel strategy, price tiers)?*

4. *What is portfolio cannibalization, and how can a company detect and reduce it through positioning and architecture decisions?*

5. *How can a corporate brand crisis affect product brands within the portfolio, and what architecture choices reduce reputational spillover?*

6. *Compare key brand management strategies: rebranding, brand extension, brand expansion, franchising, licensing, co-branding, mergers/acquisitions. When is each appropriate?*

7. *What criteria should be used to decide whether to invest in, maintain, reposition, harvest, or discontinue a brand within a portfolio?*

Practical lesson 5

Topic: Calculation of Consumer Loyalty Index (NPS)

Aim: to develop the ability to measure and interpret customer loyalty using the Net Promoter Score (NPS) method, calculate NPS correctly from survey data, critically assess the strengths and limitations of NPS for brand management, and formulate practical recommendations to improve customer experience and loyalty based on NPS results.

Questions to prepare for the lesson:

1. Key concepts: NPS, customer loyalty.
2. NPS calculation methodology.
3. How to use NPS to measure customer loyalty and improve your business.

Tasks:

1. Get acquainted with the NPS calculation methodology: review sources that explain the principles and importance of the consumer loyalty index.

Understanding that NPS is determined based on one simple question: "To what extent are you willing to recommend our product/service to your friends or colleagues?" The score is given on a scale from 0 to 10.

2. Classification of respondents according to the survey results:

Promoters: customers who gave a rating of 9 or 10. These are loyal consumers who are willing to recommend the company.

Passives: Customers who gave a rating of 7 or 8. They are neutral, and although satisfied with the product, may not be active advocates.

Detractors: Customers who gave ratings of 0 to 6. They are less satisfied and may discourage others from using the product.

Formula for calculating NPS:

$$\text{NPS} = \% \text{ promoters} - \% \text{ detractors.}$$

The indicator can range from -100 to +100. A positive value means there are more loyal consumers than dissatisfied ones.

3. Practical task:

Students are given real or fictional customer survey results. Classify respondents into promoters, passives, and detractors.

- 1) Calculate NPS for a specific business or product.
- 2) Analysis of results and conclusions: analyze the resulting NPS and provide recommendations for improving customer loyalty.
- 3) Discuss how a company can use NPS to improve service, product, or communication strategies.
- 4) Presentation of results:
Each team presents its NPS calculation results and loyalty improvement strategies based on the data obtained.

Control questions:

1. *What is NPS, what question is used to measure it, and what does NPS indicate about customer loyalty?*
2. *How are respondents classified into Promoters, Passives, and Detractors, and why are Passives treated differently in the calculation?*

3. *How is NPS calculated from survey results (give the formula and explain each component)?*
4. *How can NPS be used in brand management decisions (e.g., service improvement priorities, communication, retention actions)?*
5. *What are the main advantages and limitations of NPS, and why should it be interpreted together with other metrics or qualitative feedback?*

Practical lesson 6

Topic: Study of Global Branding Strategies

Aim: to develop the ability to analyze and justify global branding strategies by comparing standardization and adaptation approaches, evaluating cultural and market drivers, and designing a consistent yet locally relevant brand strategy (positioning, communication, and brand architecture) for international markets.

Questions to prepare for the lesson:

1. Concepts: global branding, global brand.
2. Differences between local and global branding.
3. Global branding strategies: standardization and adaptation.

Tasks:

1. Get to know the main strategies of global branding:
 - standardization: using a single brand strategy worldwide (e.g., the same positioning, communications, visual brand style).
 - adaptation: adapting the brand strategy to local markets, taking into account cultural, social, and economic characteristics.

2. Compare global branding approaches:
Analyze examples of brands that use a standardization strategy (e.g., McDonald's, Coca-Cola) and brands that adapt their strategies to different markets (e.g., Unilever, Nestlé).

Conduct an analysis of the advantages and disadvantages of each approach, in particular, how standardization helps reduce costs and adaptation helps better meet the needs of local consumers.

3. Developing a global branding strategy:

Choose a fictional or real brand and develop a global branding strategy for it. Decide whether the brand will use standardization, adaptation, or a hybrid approach that combines both methods.

4. Analysis of factors influencing the choice of a global brand strategy:

Students should explore factors such as cultural differences, market regulation, economic conditions, technological developments, and the impact of globalization and digitalization on the development of global brands.

5. Studying successful cases of global brands:

Analyze specific examples of companies that have successfully developed global brands (e.g., Apple, Nike, Starbucks), investigate their strategies for expanding into foreign markets, and their communication with different audiences.

Presentation of the developed strategy:

Each team presents its global branding strategy and explains why the chosen approach is the most effective for the brand in a specific environment.

Control questions:

1. *What is global branding, and how does it differ from international marketing of a brand without a unified global strategy?*

2. *Compare global brand standardization vs local adaptation: what are the benefits, risks, and typical use cases for each approach?*

3. *What is the “glocal” approach, and how can a brand keep a consistent core identity while adapting executions locally?*

4. *Which external factors most influence global branding decisions (culture, language, regulation, competition, consumer behavior), and how should they be assessed?*

5. *How do brand elements (name, logo, slogan, packaging, tone of voice) change when entering new markets, and what elements should typically remain stable?*

6. *What entry modes (exporting, licensing, franchising, joint venture, wholly owned subsidiary) create the greatest branding control, and how does control affect consistency?*

7. *How can a company measure the effectiveness of a global branding strategy across markets (brand awareness, associations, preference, loyalty, brand equity metrics)?*

Practical lesson 7

Topic: Study of Digital Technologies in Branding

Aim: to develop the ability to analyze how digital technologies shape brand building and brand equity, select appropriate digital branding tools (e.g., social media, content platforms, analytics, AI-driven personalization), and design consistent, measurable digital brand communications across online touchpoints

Questions to prepare for the lesson:

1. Digital branding, digitalization in branding.
2. The impact of digital technologies on brand development.
3. Digital branding tools: social media, SEO, content marketing, programmatic advertising, and artificial intelligence.

Tasks:

1. Get to know the main digital branding tools:

Social media (Facebook, Instagram, TikTok, LinkedIn) as platforms for engaging with your audience and building brand presence.

SEO (search engine optimization) as a way to increase brand visibility in search engines.

Content marketing (blogs, videos, podcasts) to create valuable materials that support the brand image.

Programmatic advertising for media purchasing automation and precise targeting.

Using artificial intelligence in consumer data analysis and communication automation (chatbots, personalized recommendations).

2. Comparison of traditional and digital branding:

Explore how digital technologies have changed branding compared to traditional approaches. For example, the impact of social media on brand image formation, mobile applications as platforms for communications, and loyalty creation.

3. Analysis of successful digital branding cases:

Research real-life cases of brands that successfully use digital technologies for promotion (e.g., Coca-Cola, Nike, Tesla) and identify which tools ensured their success. It is also important to assess the role of personalization and big data in creating a unique consumer experience.

4. Developing a digital branding strategy:

Develop a brand strategy that includes various digital tools. They should determine which platforms and tools will be most effective in reaching their target audience. Pay attention to how to use digital tools to build an emotional connection with your audience and create long-term brand loyalty.

5. Presentation of digital branding strategy:

Each team presents a developed digital branding strategy using various tools, explaining how they plan to use technology to increase brand awareness, attract, and retain customers.

Control questions:

1. What is digital branding, and how does it differ from digital marketing in terms of goals and outcomes for the brand?

2. Which digital touchpoints most strongly influence brand perception (website, social media, marketplaces, apps, search), and how can consistency be ensured across them?

3. *How do data and analytics support branding decisions in digital environments (segmentation, personalization, customer journey analysis, content optimization)?*

4. *What opportunities and risks do AI and automation create for branding (personalization, content generation, customer support; risks to authenticity, bias, privacy)?*

5. *What key metrics can be used to evaluate the effectiveness of digital branding initiatives (awareness, engagement, sentiment, conversion quality, loyalty), and why should multiple metrics be combined?*

Practical lesson 8

Topic: Practical Experience in Ecological Branding

Aim: to develop the ability to design and justify an ecological branding approach for a product/company by integrating sustainability values into brand identity, value proposition, communications, and customer experience, while ensuring credibility, regulatory compliance, and protection against greenwashing.

Questions to prepare for the lesson:

1. Ecological branding, sustainable development in branding.
2. The role of environmental branding in modern business.
3. Examples of successful eco-branding and environmental responsibility strategies.

Tasks:

1. Learn the basics of eco-branding:

Explore the concepts of sustainability and their impact on creating environmentally responsible brands. Become familiar with key concepts such as "green branding", "eco-products", "social responsibility", and "ecological footprint".

2. Analysis of successful cases of environmental branding:

Students should research real-life cases of brands that have emphasized environmental responsibility, such as Patagonia, The Body Shop, and Tesla. Analysis of their sustainable development strategies, which include the use of environmentally friendly materials, recycling, carbon reduction, and energy conservation.

3. Developing an ecological branding strategy:

Choose a fictional or real brand and develop an eco-branding strategy for it. It should include: Using environmentally friendly materials in products or packaging. Developing a communication strategy that emphasizes the brand's environmental values. Support for environmental initiatives (e.g., tree planting, waste reduction).

4. Assessing the benefits and challenges of environmental branding:

Conduct research into the benefits that eco-branding brings to businesses (increased customer loyalty, improved reputation) as well as the challenges (higher costs, risk of accusations of "greenwashing").

Discuss how eco-branding impacts competition and how brands can avoid superficial claims about their environmental responsibility.

5. Presentation of results:

Each case team prepares a presentation of its eco-branding strategy, explaining how the brand will uphold its environmental values and what tools it will use to do so.

A discussion is held between teams on how eco-branding can contribute to the long-term sustainability of the brand and its competitiveness.

Control questions:

1. *What is ecological (green/sustainable) branding, and how does it differ from CSR communication and eco-marketing campaigns?*

2. *Which brand identity elements should reflect sustainability (mission, values, positioning, personality, visual/verbal cues), and how can they remain consistent with the core brand promise?*

3. *What types of environmental claims exist (e.g., recyclable, carbon-neutral, biodegradable), and what evidence is required to support such claims responsibly?*

4. *What is greenwashing, what are its main forms, and how can a brand reduce greenwashing risk in messages, packaging, and digital communications?*

5. *How do eco-labels, certifications, and sustainability reports influence consumer trust, and how should a brand use them without misleading customers?*

6. *What metrics can be used to evaluate the effectiveness of ecological branding (brand trust, willingness to pay, loyalty, and reputation indicators) alongside environmental performance measures?*

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