Team Announcement Checklist

This is an outline of a process to follow when an Advisory team is expanding with a key role or forming a partnership.

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| **Step** | **Announcement Activity** | **Person Responsible** | **Completed** |
| **CLIENT FACING COMMUNICATION** |
| 1 | Call your top clients personally  |  |  |
| 2 | Send an email Announcement to all clients |  |  |
| 3 | Post a LinkedIn Announcement |  |  |
| 4 | Add to your AGENDA for next Review Meeting cycle[[1]](#footnote-1) |  |  |
| 5 | Send out your updated Introduction Kit as a meeting follow up with hand-written card (for New Advisors) |  |  |
| 6 | Post in your Newsletter (if applicable) |  |  |
| 7 | Introduce them to clients as they come to the office |  |  |
| **BEHIND THE SCENES** |
| 1 | Clarity on Roles & Responsibilities  |  |  |
| 2 | Logistical Set Up: Office, Desks, PC, Phone, etc. |  |  |
| 3 | Set up on CRM, software & other needed Programs |  |  |
| 4 | Order Business Cards & other branded items needed |  |  |
| 5 | Email Signatures Set Up Consistently  |  |  |
| 6 | Website Updated |  |  |
| 7 | Introduction Package Updated |  |  |
| 8 | Clients tagged on CRM with respect to Lead Advisor  |  |  |

1. Full scope of team and approach should be briefly reinforced in all meetings going forward. [↑](#footnote-ref-1)