|  |  |  |
| --- | --- | --- |
| **Annual Branding Checklist** | **Completed on:** | **Completed by:** |
| **Traditional Client-Facing Items**  |  |  |
| 1. Business Cards
2. Folders
3. Letter Head
4. Note Pads
5. Pens
 |  |  |
| 1. Standard Letters
2. Standard Agendas
3. Standard Client Forms
 |  |  |
| **Email Communication**  |  |  |
| 1. Consistent Email Signature
2. Out of Office Template
3. 1st Appointment Confirmation
4. 2nd Appointment Confirmation
5. 3rd Appointment Confirmation
6. Review Meeting Confirmation
7. Review Meeting Follow Up
 |  |  |
| **Introduction Kit**  |  |  |
| * Annual Review
* Have 6 to 12 Assemble and ready to go
* Have cards on hand for handwritten note
 |  |  |
| **Website**  |  |  |
| * Annual Review
 |  |  |
| **LinkedIn Profile**  |  |  |
| * Annual Review
* Triggers set on Your CRM for regular posting
 |  |  |
| **Newsletters** |  |  |
| * Triggers set on Your CRM for regular posting
 |  |  |
| **Verbal Communication** |  |  |
| * Schedule & Confirm Meeting Call Scripts
* Standard Service Call Script
 |  |  |