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| **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 |  |  |