Communication & Branding Guidelines

Use these communication guidelines to improve the consistency of your brand within your practice.

Choose and review one communication area at a times.

Involve your team and make sure they are fully aware of all communication standards going forward.

Traditional Client-Facing Items

- Have a good up-to-date supply of your regularly used branded items including:
    - Business Cards
    - Folders
    - Letterhead
    - Notepads
    - Pens
- Create standardized templates for all client communication[1] including:
    - Letters
    - Agendas
    - Client Forms
    - Any other written deliverables involved in delivering your client experience
- Follow all firm-established branding standards for all forms of written communication related to:
    - Size and style of paper
    - Logo size and placement
    - Headers and footers
    - Page set up (margins, spacing and layout)
    - Regular Font Style & Size
    - Heading Font Style & Size
    - Written Salutations and Closures

[1] Always consult firm policies and standards for marketing and written correspondence. Everything must be in accordance with firm marketing and legal standards (i.e. compliant).

Email Communication

1. Ensure all your email communication adheres to the same branding standards as in your written communication (i.e., logos, font style, size, etc.) as established by the firm.
2. Develop a standardized email signature for the team including name, title, team, and relevant contact information.
3. Create an “Email Template” for your standard Out-of-Office Reply and make it interesting.
4. Create an “Email Template” for commonly used correspondence to ensure efficiency and consistency:
    - 1st Appointment Confirmation
    - 2nd Appointment Confirmation
    - 3rd Appointment Confirmation
    - Review Meeting Confirmation
    - Review Meeting Follow Up

Introduction Kit

1. Ensure that your Introduction Kits adhere to the same branding standards as in your written communication (i.e., logos, font style, size, etc.) as established by the firm.
2. Ensure that the information in your Introduction Kit supports and is consistent with your other client communication (websites, LinkedIn Profile, etc.).
3. Set a reminder annually to review and update your Introduction Kit.

Website

1. Ensure the standards for your web-based communication adhere to the same branding standards as in your written communication (i.e., logos, font style, size, etc.) as established by the firm.
2. Ensure the information on your website supports and is consistent with your other client communication (Introduction Kit, LinkedIn Profile, etc.).
3. Set a reminder annually to review and update your website.

LinkedIn Profile (or other social media presence)

1. Ensure that your LinkedIn Profile adheres to the same branding standards as in your written communication (i.e., logos, font style, size, etc.) as established by the firm.
2. Ensure the information on your LinkedIn Profile supports and is consistent with your other client communication (Introduction Kit, websites, etc.).
3. Set a reminder annually to review and update your LinkedIn Profile.
4. Additional information on maintaining and managing your LinkedIn and/or other social media in terms of the dynamic content is covered in the best practice called **How to Integrate Social Media.**

Newsletters (Digital or Hardcopy)

1. Ensure the standards for your newsletters adhere to the same branding standards as in your written communication (i.e., logos, font style, size, etc.).
2. Create a "Newsletter Template" to increase efficiency and consistency.
3. Develop standard topics or sections included in each newsletter.
4. Advisor Stream is a turn-key solution for digital newsletters, and this is covered in the best practice called **Super-Charge Your Client Experience**.

Verbal Communication

1. Develop a standard telephone script for answering the telephone and make sure everyone on the team adheres to it.
2. Create a standard voice message and make sure everyone has it recorded appropriately on their voice mail.
3. Identify other routine client interactions and create scripts to support them, such as:
    - Setting up Appointments
    - Confirming Appointments
    - Standard Service Calls (Housekeeping, RSP & Tax Time)