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| **Annual Branding Checklist** | **Completed on:** | **Completed by:** |
| **Traditional Client-Facing Items** |  |  |
| * Business Cards * Folders * Letter Head * Note Pads * Pens |  |  |
| * Standard Letters * Standard Agendas * Standard Client Forms |  |  |
| **Email Communication** |  |  |
| * Consistent Email Signature * Out of Office Template * 1st Appointment Confirmation * 2nd Appointment Confirmation * 3rd Appointment Confirmation * Review Meeting Confirmation * 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 Maximizer for regular posting |  |  |
| **Newsletters** |  |  |
| * Triggers set on Maximizer for regular posting |  |  |
| **Verbal Communication** |  |  |
| * Schedule & Confirm Meeting Call Scripts * Standard Service Call Script |  |  |