|  |  |  |
| --- | --- | --- |
| **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
 |  |  |