

Financial Practice Brand & Marketing Worksheet

BRAND ELEMENTS

Company value proposition – why you?

- Written from the audience's perspective

Company tag line:

Brand colors:

- The color emotion guide is your best resource for this

Business Card:

- What image is it giving off?
- What's the first thing you think when you see the card?

Website:

- When people Google you, what will they see?
- Once somebody gets to the website, what do you want them to do?
- Look at your website as ask, "Am I attracting people or pushing them away?" Is there anything about it that makes someone want to learn more, or is it static, stale, or just like everyone else's? Does it speak to a generation that has a less than 7 second attention span and has extremely high online expectations?
- Does it reflect who you are and provide a little personality?
- Examine your language/message and communication style – are you communicating in a language and style people can relate to and connect with?

Social media:

Which platforms are you on, and which should you be on?

- LinkedIn
 - FaceBook
 - Twitter
 - YouTube
 - Pinterest
 - Podcast
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- How can you have engaging conversations?
 - Clients love to know what you're doing – they like to relate to us as people, not just professionals
 - What are we celebrating? For your practice and your clients – find ways to celebrate together!

Print materials/PDF:

- What is your company experience – do you have a brochure that details from start to finish what it is like to work with you and what someone can expect
- Materials for new business – help us get to know you and what matters to you (data sheet), and how we might be able to help you (lines of business)
- Materials for renewing existing business – how has the past year treated you (about them), what went well, what didn't? What do we need to do differently or better?
- eBooks/Whitepapers – are you an expert in certain things that you can quantify for a broad audience?

Voicemail:

- Can you make it more fun and engaging within reason?

Attire:

- Know your audience - suits may not always be a must anymore
- You might want to lose the tie
- Appearance is all about making the right first impression

MARKETING PLAN ELEMENTS

1. Marketing Objective(s):
2. Target Audience(s):
3. Competition and other obstacles:
4. Value proposition to communicate:
5. Articulate Desired Response (depending on medium):
6. Communication Tactics:
7. Implementation and timelines:

blue

TRUST
SMART
CALM
FAITH
NATURAL
STABLE
POWER

red

LOVE
IMMEDIACY
ENERGY
SALE
PASSION
ANGER
HUNGER

black

BOLD
RICH
POWER
MYSTERY
ELEGANCE
EVIL
STRENGTH

green

SOOTHING
ECO-FREINDLY
NATURAL
ENVY
JEALOUSY
BALANCE
RESTFUL

yellow

CHEER
ATTENTION
CHILDISH
FRESH
WARMTH
ENERGY
OPTIMISM

orange

HEALTH
ATTRACTION
STAND OUT
THIRST
WEALTH
YOUTHFUL
HAPPINESS

pink

TENDERNESS
SENSITIVE
CARING
EMOTIONAL
SYMPATHETIC
LOVE
SEXUALITY

purple

ROYAL
MYSTERIOUS
ARROGANT
LUXURY
CHILDISH
CREATIVE
SADNESS

COLOR EMOTION GUIDE

OPTIMISM CLARITY
WARMTH

FRIENDLY CHEERFUL
CONFIDENCE

EXCITEMENT YOUTHFUL
BOLD

CREATIVE IMAGINATIVE
WISE

TRUST DEPENDABLE
STRENGTH

PEACEFUL GROWTH
HEALTH

BALANCE NEUTRAL
CALM

