

Brand Habits Checklist



Do you have habits that help you build a memorable brand? Use this checklist to review your brand and determine if any changes are required to better position your business.

SET THE FOUNDATION

Check

Create internal brand guidelines everyone follows for consistency

Check your design assets reflect your brand and positioning

Develop an elevator pitch. Make sure all employees know it

Define your audience and match your brand to their needs

Provide a brand toolbox with approved assets staff can use in their marketing

Ensure any platforms, affiliates or events you support complement your brand story

Find brand stories you admire and identify what you can adopt

CREATE STRONG IMPRESSIONS

Check

Conduct a brand audit on your website quarterly

Monitor social media to check your brand tone is consistent

Dedicate a person/team to regularly schedule brand marketing

Investigate new marketing strategies

ENGAGE YOUR CLIENTS

Check

Review your processes for brand consistency across communications and user experiences

Ensure client on-boarding documentation is clear and easy to follow

Create a feedback loop for your client-facing team members

Check that your information is up-to-date and relevant to your audience

Implement a feedback loop system to gauge client experience

Talk to high value clients to determine if their experience matches your brand

SHARE YOUR BRAND VALUES WITH YOUR TEAM

Check

Appoint an employee to be your brand champion

Ensure new staff, suppliers and contractors understand your brand

Engage staff regularly on brand behaviours

Host regular reviews and planning sessions for branding and marketing

Have an annual strategy session to discuss your brand and any necessary changes

Brand Habits Checklist Explanations



SET THE FOUNDATION

Brand consistency

Brand consistency is crucial to having a reliable brand that clients know and expect. You want all communications and touchpoints to consistently reflect your brand, so your audience becomes familiar with you. Brand guidelines set out how your brand is designed and used.

Design assets

Brands that use unique, ownable and consistent assets at every touchpoint become distinctive and stand out clearly in clients' minds. Any elements involving design--such as your website, logo, business cards, social media images and communications--are considered design assets if they are meant to connect your audience with your brand.

Elevator pitch

Your elevator pitch is a short pitch that tells people what you do and who you help. All employees should be able to answer those questions confidently and accurately.

Define your audience

A strong brand is relevant to its audience. Make sure you know your market and your ideal clients, and what appeals most to them.

Using approved brand assets

Make your brand assets easy to find and use. Be clear on what is and is not an approved brand asset. Reinforce the importance of using only approved brand assets and avoid, if possible, clip art or generic images.

Brand alignment

Identify channels that target potential high value clients, reinforce your brand vision and complement your business. Consistently engage with them to elevate your brand. You could write thought-leadership pieces, speak at relevant networking events or be a guest on related podcasts.

CREATE STRONG IMPRESSIONS

Quarterly website review

Don't risk losing a potential new client because of a simple error on your website. Review each page of your site regularly to ensure information is correct, up-to-date, and easy to understand.

Social media audit

Social media is an important brand channel that allows for valuable client engagement. Find the channel or channels that fit your brand and engage your clients, and have active profiles there.

Dedicated person

Have a dedicated person regularly schedule marketing and communications. This keeps your brand consistent and up-to-date, and ensures these tasks remain a priority.

New marketing strategies

It's easy to keep repeating what worked in the past, but new technologies emerge and clients expect a current feel to your branding. Keep informed and be open to change as trends evolve.

Brand Habits Checklist

Explanations



ENGAGE YOUR CLIENTS

Regular review for brand consistency

It's important to ensure your current brand is reflected across all communications and in your clients' experiences. Conduct an audit to find any out-of-date documents or areas that could do with a refresh. Ensure they have current branding.

Onboarding documentation

How easy is it for a new client to navigate your business? Put yourself in their shoes. Revise or eliminate anything that is confusing or difficult to understand. Does your brand suddenly change once a prospective client becomes an official client? Make sure the brand is consistent even in onboarding documentation.

Employee feedback loop

Give your team a way to report concerns, solutions and innovations. Because they work with your clients, they'll see gaps and areas for improvement, as well as possible ways to address them.

Review information

Layout all the items you use, and ensure they are appropriate for your audience. Are you communicating directly to your ideal client and their pain points? Is what you write relevant?

Feedback loop system

Ensuring that your brand continues to be meaningful for your audience is critical for maintaining a healthy brand. A feedback loop system is about checking in with clients at regular intervals--such as client satisfaction surveys--to see if what you're doing is working.

High value clients

Identify high value clients - not just based on their financial worth, but how well they fit the vision for your company brand. These are your priority people. Check in with them to make sure your brand is delivering on its promise.

SHARE YOUR BRAND VALUES WITH YOUR TEAM

Brand guardian

Make this person responsible for overseeing any monthly, quarterly or annual reviews of your brand.

Brand introduction

Using your brand guidelines ensure all employees--including new ones--know, understand and reflect your brand.

Brand behaviours

Your team represents your brand. Make sure their behaviour reflects your desired brand behaviours. Is your brand overly friendly? Funny? Formal? Informal? Ensure your team is aware of and reflects your brand.

Regular review and planning sessions

Use these sessions to outline progress on any active communications, and plan any changes or revisions to your brand.

Annual strategy session

The brand guardian pulls together the entire team to plan the direction for the next year. Reset goals and targets for the upcoming year.

Need help with your brand?

Branding for Xero Partners is Bizink's speciality! Learn how branding can direct new customers to your accounting business – [Contact us](#) to chat about your branding requirements today.