



3 HIGHLY EFFECTIVE STEPS TO TURBOCHARGE YOUR BRAND

MY BRAND WORKBOOK

NAME _____

TEAM/FIRM _____

Congratulations on taking the first step to boost your brand power!

This course will provide insight into what it takes to effectively communicate and depict your brand value in a way that's different from other financial professionals. You will see examples of how other firms have done this and hear stories of advisors who have transformed their business with a few simple steps.

To get the most out of this course, we recommend you:

WATCH THE WEBINAR

This workbook is part of our webinar on demand, Turbocharge your brand. You will get the most out of this work -- along with the opportunity to earn CE credit for CFP and CIMA -- when you watch the webinar.

PRINT THIS WORKBOOK

Have a copy of this workbook and a pen or pencil at the ready to completely engage during the session. We are going to ask you to brainstorm ideas and take notes as we go. You can browse the workbook beforehand, and even get started filling out page 2 ahead of time. But we'll also walk you through the important details during the webinar.

TAKE ACTION

Build on what you discover in this workbook to take action in your business. Our 21-day plan provides easy steps to take to get started.

WARMUP

Why does my brand matter?

The biggest issues I face in my practice today:

How I want clients to think about my practice:

Brands that have a distinct place in my life:

STEP 1:

Define

Defining your brand starts with writing down current elements of your practice. How do you describe yourself to clients and prospects today? This includes what you do and your motivation for doing it. Also consider the clients you serve, as well as your ideal clients. Use clear, definitive statements. This will establish a foundation on which to build your brand.

Why do I do what I do?

Think of what motivates you to do this work each day – the “why” behind your practice. Maybe it’s a story about an individual you’ve helped that captures the essence of your value.

What are my qualifications?

List what you bring to the table in these three key categories:

C

D

E

Whom do I serve?

Describe your current clientele.

STEP 2:

Differentiate

Brand distinction is all about what separates you from the competition. You may have an idea of what it is, but your clients know it firsthand. Start by determining your value in the marketplace, through self-assessment and client feedback.

Which clients should I ask for feedback?

New clients

Why did you come?

- What were you looking for when choosing an advisor, and what led you to us?
- What was the biggest factor in deciding to work with us?

Long-term clients

Why do you stay?

- What do you value most about working with me and my practice?
- What can we do to continue to earn your business?

Former clients

Why did you leave?

- What was the biggest factor in deciding to seek advice elsewhere?
- If you are working with another advisor, what does that firm offer that we didn't?

Clients think of my practice as ...

Identify three distinctive words that you want your clients to associate with your brand:

1 _____ 2 _____ 3 _____

My brand message

Describe your practice in a few sentences. Think about incorporating your personal “why” story and connecting it with what matters most to your clients. Don’t worry about getting it perfect right now. Share with your team and let them help the message evolve.

STEP 3:

Demonstrate

Once you know the value you offer, it’s time to bring your brand to life. Take a new look at your practice through the eyes of clients and prospects. Do your marketing materials, website and office environment reflect the brand experience you want to convey? Do they capture your “why” and embody your three key descriptors?

Does my bio do me justice?

Team member bios lend significant credibility to you and your practice, and travel with you everywhere. What could you add or change about your bios or “About Us” section of your website to echo your brand promise?

Does my website speak to the clients I want to reach?

Is it immediately clear what my brand represents on my website? On LinkedIn? In local search engine results?

Does my office environment reflect/reinforce my brand?

List three easy changes to your space that can help create a personal and sensory experience for clients.

Additional ideas, insights and personal next steps:

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