Marketing & Branding Preparation

1. Confirm the individual in the organization who is responsible for Marketing & Branding.
2. Have them carefully review the Marketing & Branding Checklist to get an idea of the types of things that should be planned and prepared for as it relates to their New Hire Onboarding responsibilities. This list may be modified depending on the nature of the New Hire.
3. Make sure you have access to each of the resources/tools/information required to execute on each step in the checklist.
4. Provide them with a copy of the firms Marketing & Branding Guidelines.
    - Refer to the sample guidelines: Effective Writing and Effective Page Design
    - This should include a Telephone Answering Scripts & Standard Email Templates
    - This should also include firm guidelines for social media use
5. Ensure they have access to your firm's branding basics, which are often readily available and do not need to be customized for each New Hire, but instead are firm-branded:
    - Letterhead & Stationary
    - Envelopes
    - Folders
    - Personal Financial Organizer (PFO) Binders
6. Where necessary, create customized branded resources to fully support the New Hire, which may include:
    - Business Cards
    - Introduction Kit
    - Website
7. Provide them with access to advanced marketing options to provide an exceptional client experience:
    - Note Pads & Pens
    - Client Gifts (Water Bottles, Mugs, etc.)
8. All New Hires need to be aware of the person and/or process for marketing approval on anything they create individually before it is used with clients.
9. Create a directory on your shared drive so others can access it.
    - Label the main folder "New Hire Onboarding Process" (If not already created)
    - Create a sub-folder called "Marketing & Branding"

- Save the Marketing & Branding Checklist along with all supporting resources in this sub-folder
- Set permissions up for all those in the organization who should be able access this information

10. Use Your CRM to manage and track these activities so you know where you are in the process (alternatively, use the Advisor Onboarding Master Checklist in the previous best practice).
    - This means building an Action Plan or Workflow on your CRM to support each of these Marketing & Branding activities
    - Apply the workflow once the New Hire Fit Process is complete and you are set for flawless delivery to each and every New Hire
11. Use this process from start to finish with every new person you add to your organization.
12. Continue to update and fine-tune this process, when required, to ensure it is the right fit for you.