

Checklist for Launching Your Financial Brand

Rolling out updated and new brand elements into an existing and well-established brand can be an extremely daunting and overwhelming task. But fear not! We are here to help break it down for you and make sure you have a successful brand launch.

In an ideal world, updating all digital, social and physical environments would happen simultaneously. However, this is not always realistic when dealing with live environments or third-party vendors that manage various aspects of your marketing. To help you streamline priorities and keep your marketing moving forward, we have listed items in order of importance:

Launching Brand Elements on your Website

Your website is the digital face of your company, typically the first impression online audiences have of your brand, your most trafficked “branch” and the primary source for online CTA’s for lead generation and customer support. Getting brand elements updated on your site first can be a quick win to help you implement the rest of your branding relaunch. Before you’re able to have a strong social, digital, or paid ads presence, you need to make sure your website delivers a consistent and strong brand message. Here are areas on your site to consider:

- ☐ **Logo on Navigation Bar**
- ☐ **Typography Throughout the Site**
- ☐ **Homepage Hero**
 - Update imagery or pattern elements
 - Update tagline and messaging
- ☐ **Product Pages**
 - Update imagery, pattern elements, and icons
 - Update tagline and messaging
- ☐ **Footer**
 - Update logo, colors, pattern elements, and icons

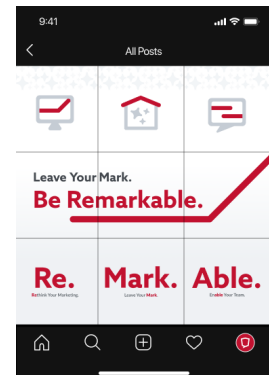
Launching Brand Elements on your Social Media Profiles

Social media platforms are where you engage and interact with your customers, community, and online audience. Taking the time to establish consistency across your social channels has a monetary impact. According to [Forbes](#), consistent branding across all platforms increases revenue by up to 23%.



With various formats and use cases for each channel, reference our [Social Media Image Size Guide](#) to help effectively update all your images.

- ☐ **Profile Photos**
 - Make sure the logo you use in your profile photo is the same for all social media channels.
- ☐ **Cover Photos**
 - It's ok to have different cover photos optimized for each specific channel. Just make sure the brand color, messaging, and imagery stay consistent and on-brand.
- ☐ **Profile Bios and About Us Sections**
 - Update tagline and brand messaging
- ☐ **Brand Announcement Post**
 - Establish a clear reference point on your social channel that marks where new brand elements will be used moving forward. On [Twitter](#) or [Facebook](#), you can create a pinned post at the top of your profile to highlight your updated brand.
 - On Instagram, consider establishing a break in your profile to visually mark your brand launch. Here is an example of how we approached our Instagram feed after our rebrand. We posted 9 images throughout a two-week span. Each post highlighted a different element of our re-brand launch. Because all the images were visually connected, it created a break in our content at the end of the series and established a new visual look moving forward.



Launching Brand Elements at your Branch Locations

Another beneficial reason of establishing a brand style guide is when it comes to brand experience. Although, the website is fast becoming the most visited branch, traditional branches continue to play an integral role in servicing your customers and is another touchpoint to be able to provide a remarkable experience.

- ☐ **Logo**
- ☐ **Interior and Exterior Signage**
 - Update logo, imagery, and pattern elements
 - Update tagline and messaging
 - Digital signage can also be used to reinforce brand imagery or other brand messages.



- ☐ **Handouts, Brochures and Business Cards**
- ☐ **Branch Colors and Interior Decor**
 - Having consistent paint colors, furniture designs and fixtures can be another way to reinforce your brand across channels.

Other Financial Brand Areas to Consider:

- ☐ **Digital Ads**
 - A brand launch or refresh is a great time to run a digital marketing ~~retargeting~~ campaign with new brand assets and messaging to introduce your brand to a larger online audience efficiently and cost-effectively. [Learn more](#) about how Social Assurance can help you use a data-first approach to develop a digital advertising strategy that drives results.
- ☐ **Listings and Reputations**
 - Update your logo, brand tagline, colors, and branch information
 - Easily manage and update your brand's online presence across hundreds of listings sites such as Yelp, Bing and Google with our [Listings and Reputations Management Service](#).

See how our [Digital Listings and Reputation platform provided American State Bank](#) the opportunity to reach more customers and generate more positive reviews.

- ☐ **Email Marketing**
 - Update logos in email header
 - Update colors, icons, and pattern elements
 - Update typefaces
 - Update headlines or taglines
- ☐ **Mobile App and Online Banking**
 - Update logo and tagline
 - Update brand colors
 - If available, update pattern elements, icons, and typefaces

The best principle to operate by throughout the whole process is **Progress over Perfection**. A brand should be continually evolving and growing. You will have time to keep iterating so just focus one small win at a time and don't lose sight of the bigger picture.